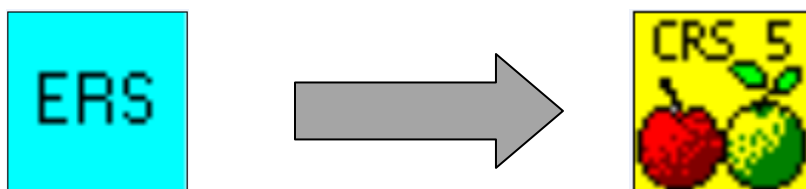


Training Manual for Users

Transitioning from ERS4 To NEERS5

June 2006



Developed by the NEERS5 Training Committee
In Cooperation with the University of Georgia and
CSREES, USDA

ACKNOWLEDGEMENTS

This manual was truly a collaborative effort among state and Federal partners. In July of 2005, an EFNEP meeting was held during the Society for Nutrition Education Conference in Orlando. The opportunity was presented for volunteers to work on various aspects of the Nutrition Education Evaluation and Reporting System (NEERS5). There was a tremendous response. Committees were formed and volunteers have given this project tremendous effort over the past year.

The NEERS5 Training Committee, chaired by Heather Danis of the University of Vermont, conducted a survey to determine the preferred format for training materials. The vast majority of respondents indicated that a manual in electronic form would be preferred. Therefore, this manual was developed and copied onto the same CD as the NEERS5 county level software (CRS5) for easy reference. The manual will also be available on the NEERS5 website. Please note that this is the Transition Manual for those who are familiar with ERS4. A comprehensive NEERS5 Manual is being developed which assumes no knowledge of ERS4.

In January of 2006, Gail Hanula of the University of Georgia volunteered to Chair the NEERS5 Training Committee on an interim basis while Heather Danis was on leave. She led the effort to develop the ERS4 to NEERS5 Transition Manual with co-author Tiffany Williams, EFNEP Data Manager at the University of Georgia. Margaret LaShore of Michigan State University was instrumental in assisting with the Youth section. Extensive field testing was conducted by NEERS5 Training Committee members and NEERS5 Coordinating Committee members. Numerous sites across the country contributed to this effort, reviewing both the software and the manual. I am grateful to all of the NEERS5 committee members for their efforts. The committee members are listed on the following page.

In addition, special thanks go to Earl Merrill of Acorn Data Systems for development of the software and extensive review of the manual, to Sylvia Montgomery for her input, coordination and testing of the software and to Dr. Mary McPhail Gray at CSREES for her support in making NEERS5 become a reality.

Wells Willis
EFNEP National Program Leader, EFNEP
CSREES, USDA
June, 2006

ACKNOWLEDGEMENTS

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1. Getting Started in CRS5

1.1. How to Use This Manual

This manual is best viewed in color because there are numerous references that are color coded.

1. This manual refers to databases as a **DB** or **DBs**.
2. The screens in this manual will be referred to by their title. Titles can be found by looking in the top left corner next to the CRS5 icon.
 - a. Example 1 - This screen would be referred to as the “Adult Switchboard” screen



- b. Example 2 - This is the “View/Edit Adult” screen.



3. Throughout these directions New Features will be highlighted in red boxes
4. Tips throughout these directions will be highlighted in purple boxes
5. These buttons appear throughout CRS5
 - a. They are referred to throughout this manual.

- i. The **BLUE explode** button brings up another screen to enter more information.



- ii. The **PURPLE** button brings up a menu to enter Recalls and Checklists.



- iii. The **YELLOW X** button is always for deleting a record, recall, or other information.



1.2. Important Features

1. Required fields throughout the program will have a yellow background
 - o You will not have the option to save screens until all yellow required fields are entered.

CRS5 - [New Adult]

File Edit Window Help Adobe PDF

ID: 3516 PP: P00001 BUFKA, IRIS 20-Jun-2006

First-Last Name: Address: City-State-ZIP: County: FIPS Code: Ethnicity: Race: American Indian or Alaskan Native Asian Black or African American Native Hawaiian or Other Pacific Islander White Not Provided Race/Ethnic Subcategory (Optional) [None] Program Status: Active Entry Date: 01-Jan-2005

Age: 0 Age not given. Gender: Female is Pregnant is Nursing Residence: <Unknown> Highest Grade: Not Supplied Household income: N/S per month (N/S=not supplied) Lesson Type: <Unknown> Number of Lessons: 0 Number of Contacts: 0 Children: Ages 0-5: 0 Ages 6-13: 0 Ages 14-19: 0 Others in Household: 0 Household Total: 1

Subgroups: F:EFNEP F:ESWIC F:FSNE F:Sample F:TeamNutrition

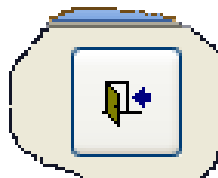
Public Assistance at Entry: F:Child Nutrition F:FDPIR F:Food Stamps F:Head Start F:Other F:TANF F:TEFAP - Commodity F:WIC/CSFP

Remarks:

At least one Federal subgroup is required

Save Cancel

2. Always use the BACK DOOR to navigate out of screens in CRS5



3. Using the TAB key throughout this program will ease your data entry.
 - o Place the cursor in the first box on the screen.
 - o Hit TAB to go to the next field.
 - o Hold down the SHIFT key and press TAB to go back to a field.

4. Some boxes that appear in BLUE Color throughout CRS5 have the ability to allow you to select more than one item in the box when it is appropriate, such as race, subgroups, or public assistance.
- Click on the item once to select it.
 - If you made an error in your selection click again to unselect that object.
 - Click on as many items as needed

The screenshot displays the CRS5 system interface. At the top, there is a blue header bar. Below it, a light blue bar contains the text "Required fields have yellow background." in yellow. The main form area has a beige background. At the top of the form, there are three fields: a dropdown menu with "0001" selected, a text field with "BUFKA, IRIS", and a date field with "20-Jun-2006". Below these, there is a yellow highlighted field labeled "icity:". To the right of this field is a dropdown menu with a blue arrow. Below the "icity:" field is a text field labeled "ace:" with a dropdown menu showing a list of race/ethnicity options: "American Indian or Alaskan Native", "Asian", "Black or African American", "Native Hawaiian or Other Pacific Islander", "White", and "Not Provided". Below this list is a text field labeled "Race/Ethnic Subcategory (Optional)" with a dropdown menu showing "[None]". Below the "ace:" field is a text field labeled "gram Status:" with a dropdown menu showing "Active". Below the "gram Status:" field is a text field labeled "Entry Date:" with a date field showing "01-Jan-2005" and a calendar icon. To the right of the "Public Assistance at Entry" section, there is a dropdown menu with a blue border and a list of options: "F:Child Nutrition", "F:FDPIR", "F:Food Stamps", "F:Head Start", "F:Other", "F:TANF", "F:TEFAP - Commodity", and "F:WIC/CSFP".

0001 BUFKA, IRIS 20-Jun-2006

Required fields have yellow background.

Address not verified.

Public Assistance at Entry

icity: [Yellow Highlighted Field]

ace: American Indian or Alaskan Native
Asian
Black or African American
Native Hawaiian or Other Pacific Islander
White
Not Provided

Race/Ethnic Subcategory (Optional)
[None]

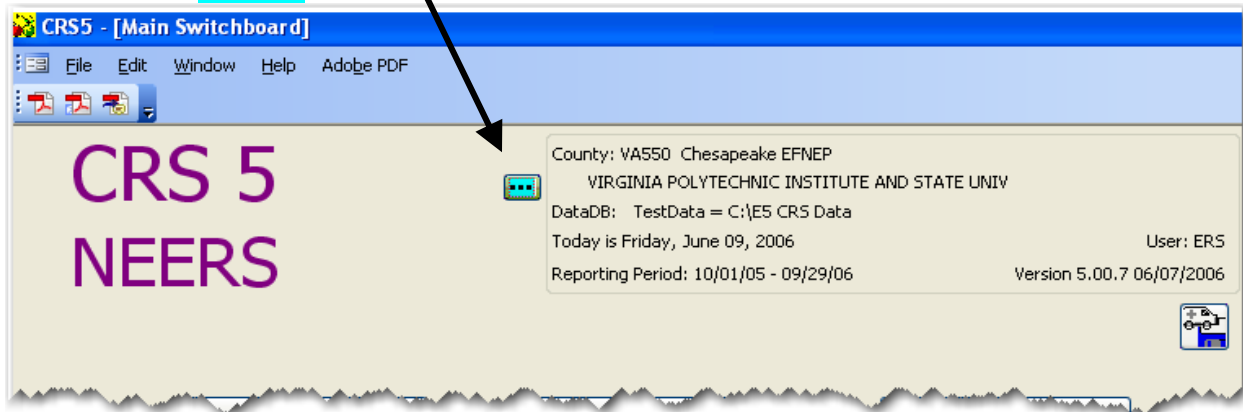
gram Status: Active

Entry Date: 01-Jan-2005


F:Child Nutrition
F:FDPIR
F:Food Stamps
F:Head Start
F:Other
F:TANF
F:TEFAP - Commodity
F:WIC/CSFP

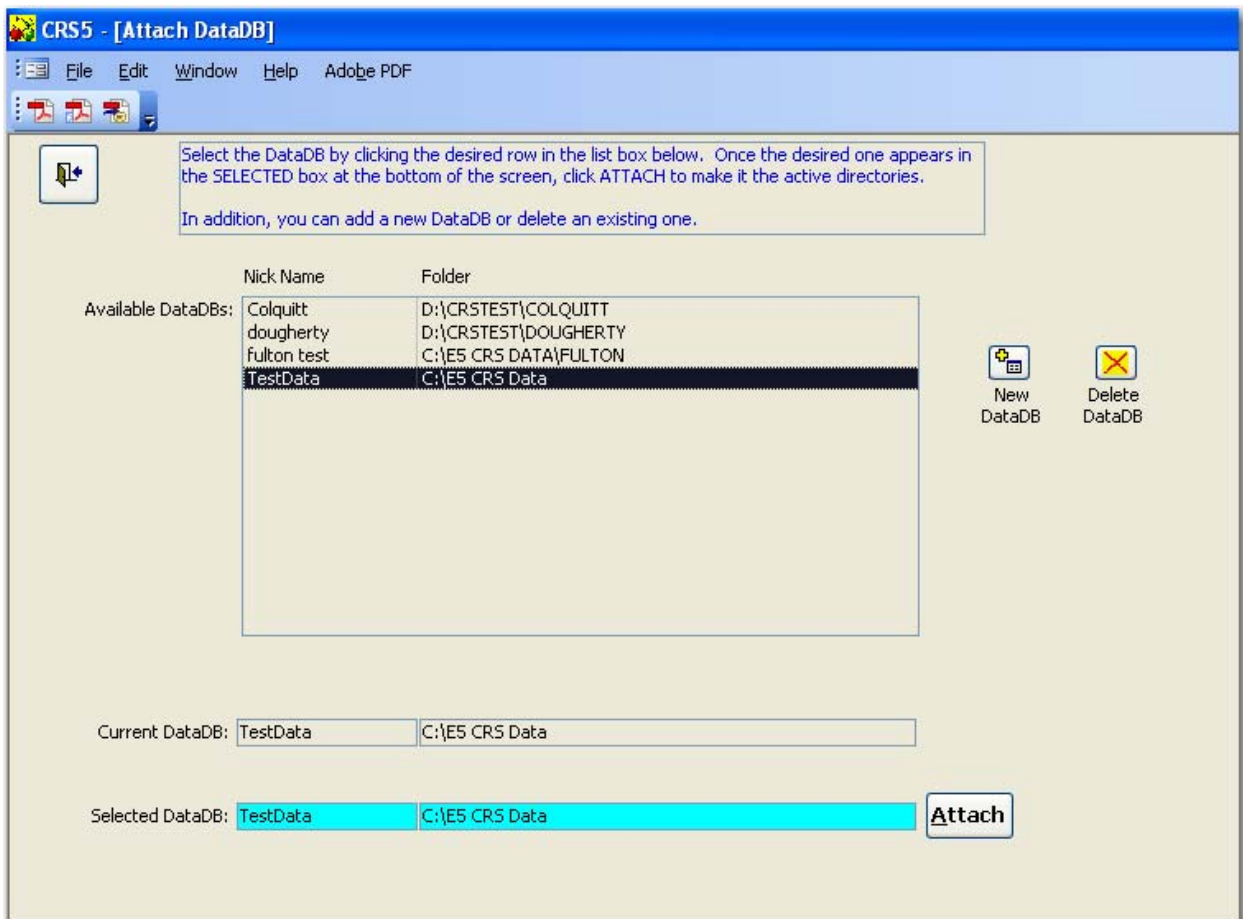
5. Quick Access to Change Data DBs

- From the Main Switchboard you can now change DBs by clicking on the **BLUE explode** button next to the current DB



You are taken to the “Attach DataDB” screen where you can select a new DB and attach it.

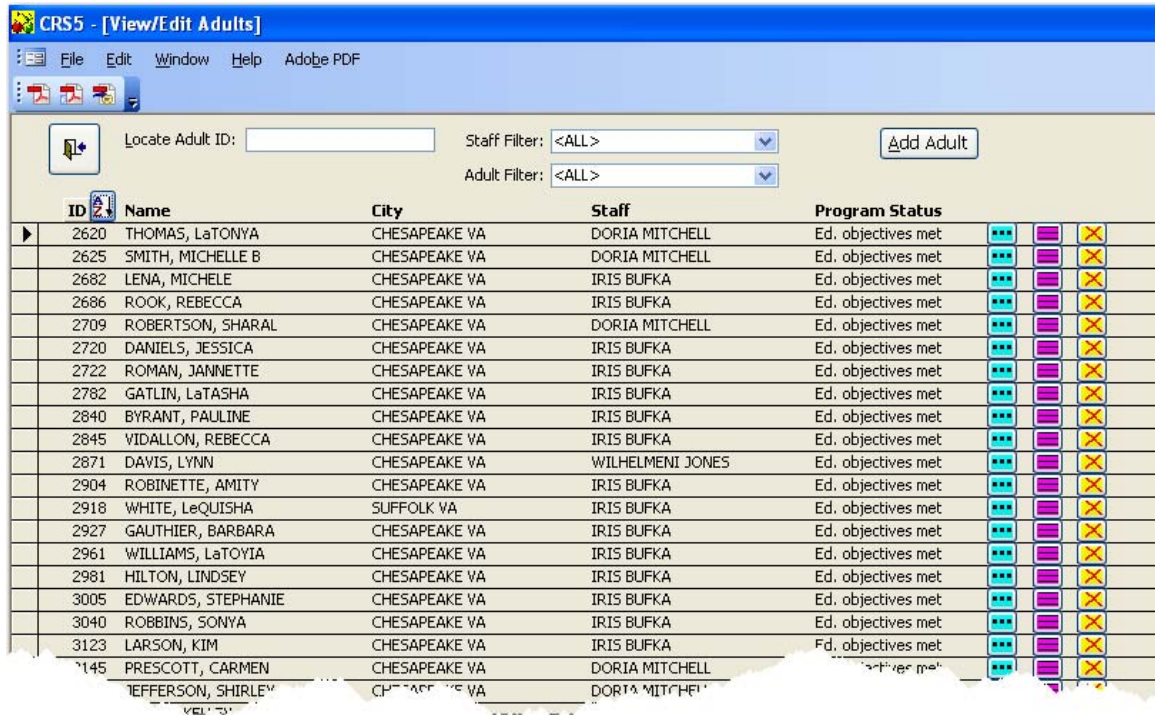
- In CRS5 there are no Table DBs to keep track of in this section.
- This screen shows you the DBs that are available on your computer.
- The current DB that is attached in CRS5 appears below as well as the DB that you are selecting to attach.
- Highlight the DataDB you wish to attach and click 



6. Sorting Columns

- Any **CRS5 - [View/Edit]** screen in any module has the ability to be sorted in different ways.
- For example this adult screen can be sorted by ID, Name, City, Staff, or Program Status.
- Simply click on the column header once to sort the list in ascending order, click twice to sort in a descending order.

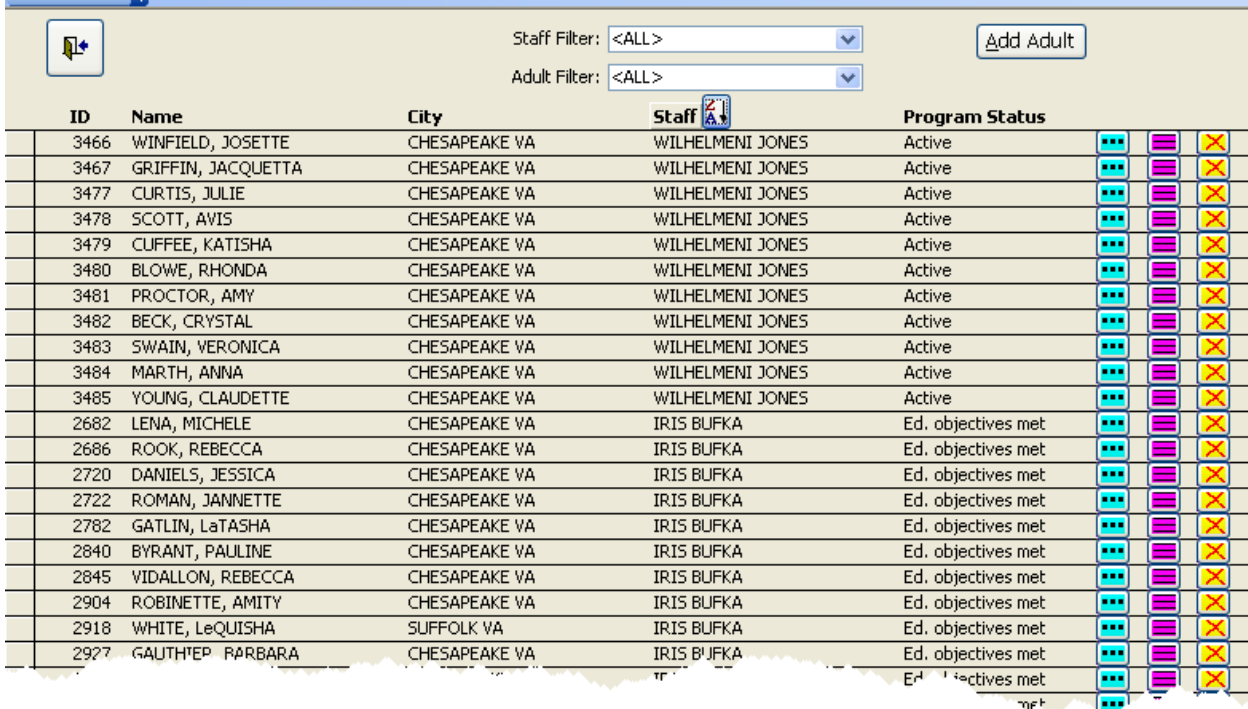
This screen is sorted by ID in ascending order.



The screenshot shows the 'CRS5 - [View/Edit Adults]' window. At the top, there is a menu bar with 'File', 'Edit', 'Window', and 'Help'. Below the menu bar, there are search filters: 'Locate Adult ID:' with a text input field, 'Staff Filter:' with a dropdown menu set to '<ALL>', and 'Adult Filter:' with a dropdown menu set to '<ALL>'. An 'Add Adult' button is located to the right of the filters. The main area contains a table with the following columns: ID, Name, City, Staff, and Program Status. The table is sorted by ID in ascending order. Each row has three status icons at the end: a green circle with a checkmark, a red circle with an 'X', and a yellow circle with a checkmark.

ID	Name	City	Staff	Program Status
2620	THOMAS, LaTONYA	CHESAPEAKE VA	DORIA MITCHELL	Ed. objectives met
2625	SMITH, MICHELLE B	CHESAPEAKE VA	DORIA MITCHELL	Ed. objectives met
2682	LENA, MICHELE	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met
2686	ROOK, REBECCA	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met
2709	ROBERTSON, SHARAL	CHESAPEAKE VA	DORIA MITCHELL	Ed. objectives met
2720	DANIELS, JESSICA	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met
2722	ROMAN, JANNETTE	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met
2782	GATLIN, LaTASHA	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met
2840	BYRANT, PAULINE	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met
2845	VIDALLON, REBECCA	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met
2871	DAVIS, LYNN	CHESAPEAKE VA	WILHELMENI JONES	Ed. objectives met
2904	ROBINETTE, AMITY	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met
2918	WHITE, LeQUISHA	SUFFOLK VA	IRIS BUFKA	Ed. objectives met
2927	GAUTHIER, BARBARA	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met
2961	WILLIAMS, LaTOYIA	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met
2981	HILTON, LINDSEY	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met
3005	EDWARDS, STEPHANIE	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met
3040	ROBBINS, SONYA	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met
3123	LARSON, KIM	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met
3145	PRESCOTT, CARMEN	CHESAPEAKE VA	DORIA MITCHELL	Ed. objectives met
3145	JEFFERSON, SHIRLEY	CHESAPEAKE VA	DORIA MITCHELL	Ed. objectives met

This screen is sorted by Staff in descending order.






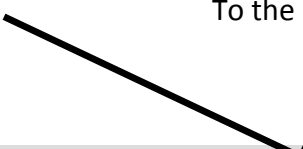
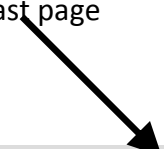


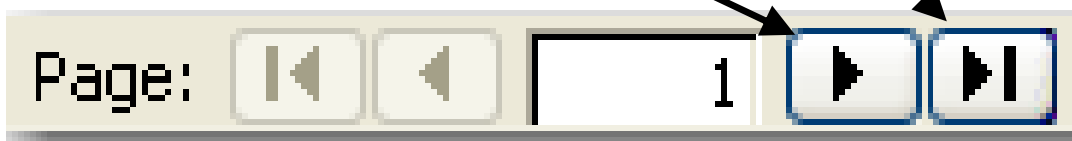
The screenshot shows the 'CRS5 - [View/Edit Adults]' window. At the top, there is a menu bar with 'File', 'Edit', 'Window', and 'Help'. Below the menu bar, there are search filters: 'Locate Adult ID:' with a text input field, 'Staff Filter:' with a dropdown menu set to '<ALL>', and 'Adult Filter:' with a dropdown menu set to '<ALL>'. An 'Add Adult' button is located to the right of the filters. The main area contains a table with the following columns: ID, Name, City, Staff, and Program Status. The table is sorted by Staff in descending order. Each row has three status icons at the end: a green circle with a checkmark, a red circle with an 'X', and a yellow circle with a checkmark.

ID	Name	City	Staff	Program Status
3466	WINFIELD, JOSETTE	CHESAPEAKE VA	WILHELMENI JONES	Active
3467	GRIFFIN, JACQUETTA	CHESAPEAKE VA	WILHELMENI JONES	Active
3477	CURTIS, JULIE	CHESAPEAKE VA	WILHELMENI JONES	Active
3478	SCOTT, AVIS	CHESAPEAKE VA	WILHELMENI JONES	Active
3479	CUFFEE, KATISHA	CHESAPEAKE VA	WILHELMENI JONES	Active
3480	BLOWE, RHONDA	CHESAPEAKE VA	WILHELMENI JONES	Active
3481	PROCTOR, AMY	CHESAPEAKE VA	WILHELMENI JONES	Active
3482	BECK, CRYSTAL	CHESAPEAKE VA	WILHELMENI JONES	Active
3483	SWAIN, VERONICA	CHESAPEAKE VA	WILHELMENI JONES	Active
3484	MARTH, ANNA	CHESAPEAKE VA	WILHELMENI JONES	Active
3485	YOUNG, CLAUDETTE	CHESAPEAKE VA	WILHELMENI JONES	Active
2682	LENA, MICHELE	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met
2686	ROOK, REBECCA	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met
2720	DANIELS, JESSICA	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met
2722	ROMAN, JANNETTE	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met
2782	GATLIN, LaTASHA	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met
2840	BYRANT, PAULINE	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met
2845	VIDALLON, REBECCA	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met
2904	ROBINETTE, AMITY	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met
2918	WHITE, LeQUISHA	SUFFOLK VA	IRIS BUFKA	Ed. objectives met
2927	GAUTHIER, BARBARA	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met

7. New Features on the Summary Screens

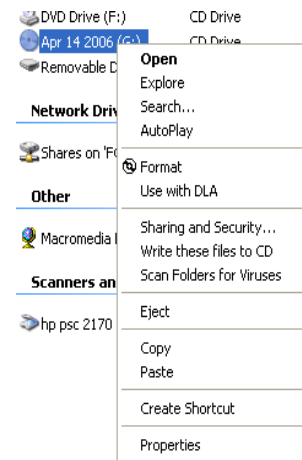


- Always click  **Close** to exit a report screen
- Click the printer icon  to print the report
- The “W” icon  allows you to send this report to a .rtf file that can be opened in Microsoft Word. Clicking on this icon will send the report to a new Word document and you can save and edit the report there.
- The “email/paperclip” icon  allows you to e-mail the report to someone as a snapshot attachment. This is set up to use your default e-mail client to send the e-mail (i.e. Outlook, Outlook Express, Thunderbird, etc.) This icon will not function properly if you are using a web based client to view your e-mail (Yahoo, Hotmail, etc.).
- The “magnifying glass”  and drop down menu are ways you can zoom in and out of the document to change the view.
- To scroll through the pages of the report use the arrows at the bottom left of the screen.
- One page forward  To the last page 



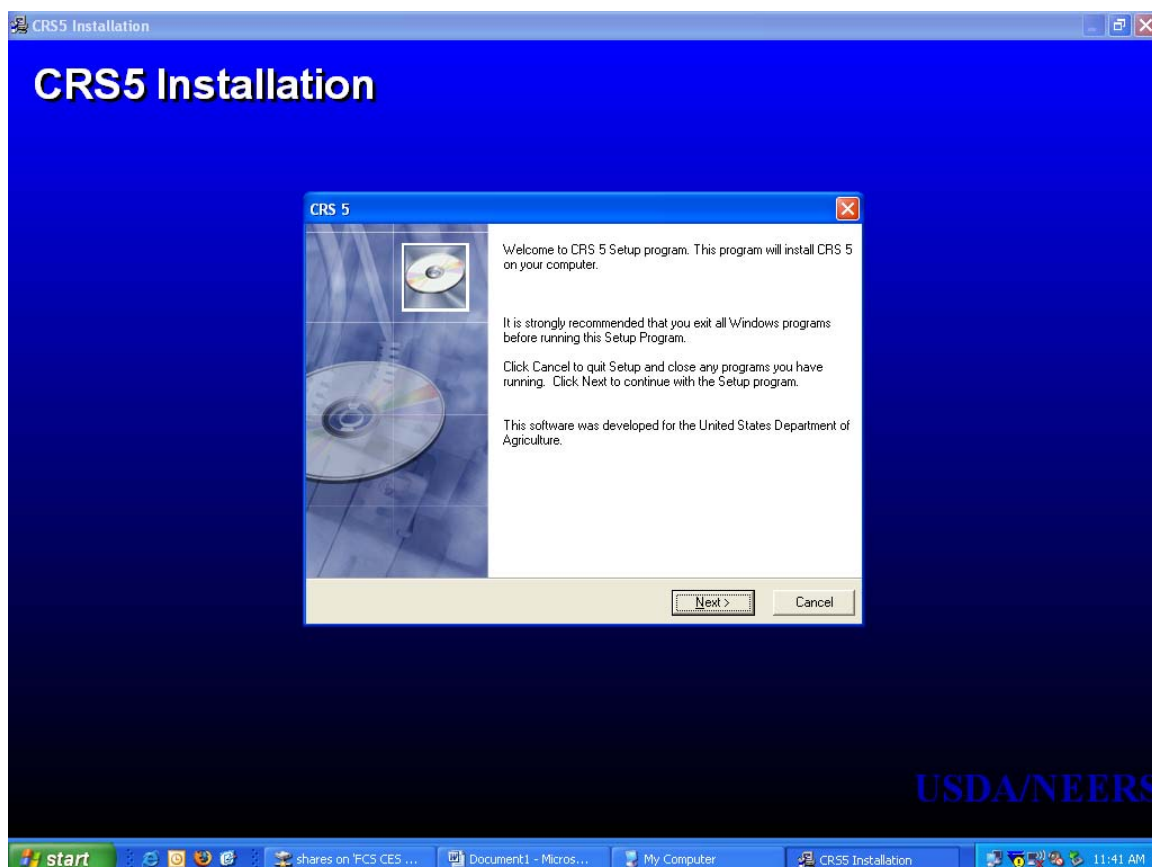
2. CRS5 INSTALLATION FROM CD

- Insert your CRS5 Installation CD into a CD-ROM drive on your computer.
- It has an autoplay feature. If it does not start running automatically open “My Computer” from your desktop.
- Right Click on the CD drive that contains the CRS5 Installation and click on Autoplay.

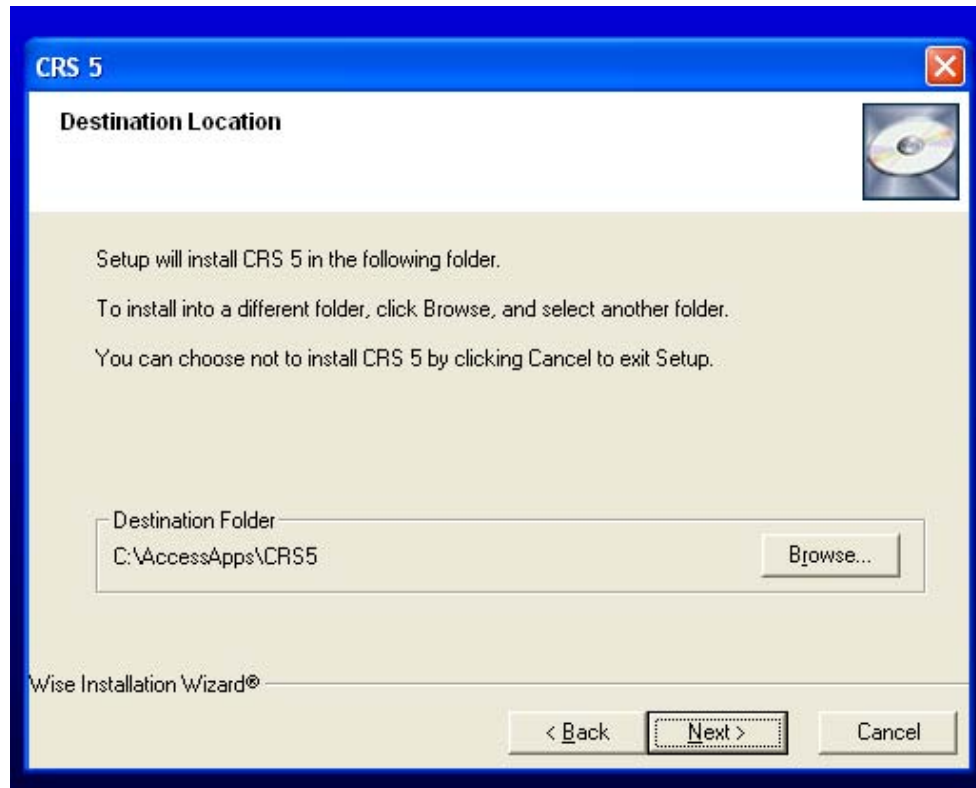


Once CRS has started running you will see this screen.
Follow all of the steps for installation using the default folders that are suggested during installation.

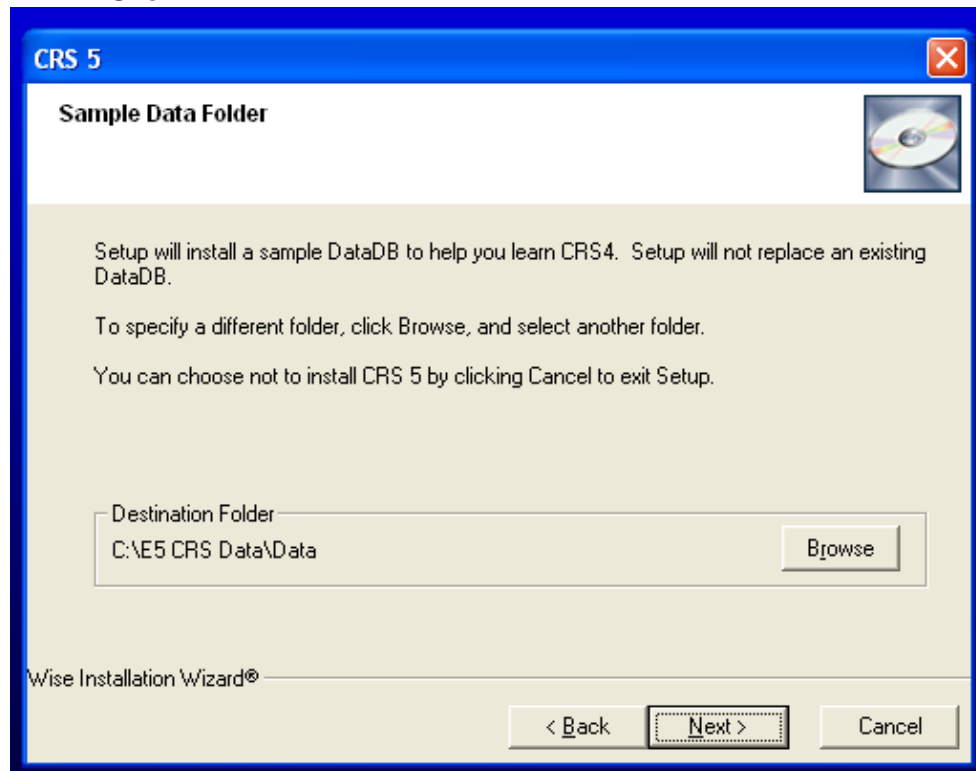
- Click **Next**
- Choose standard
- Click **Next**

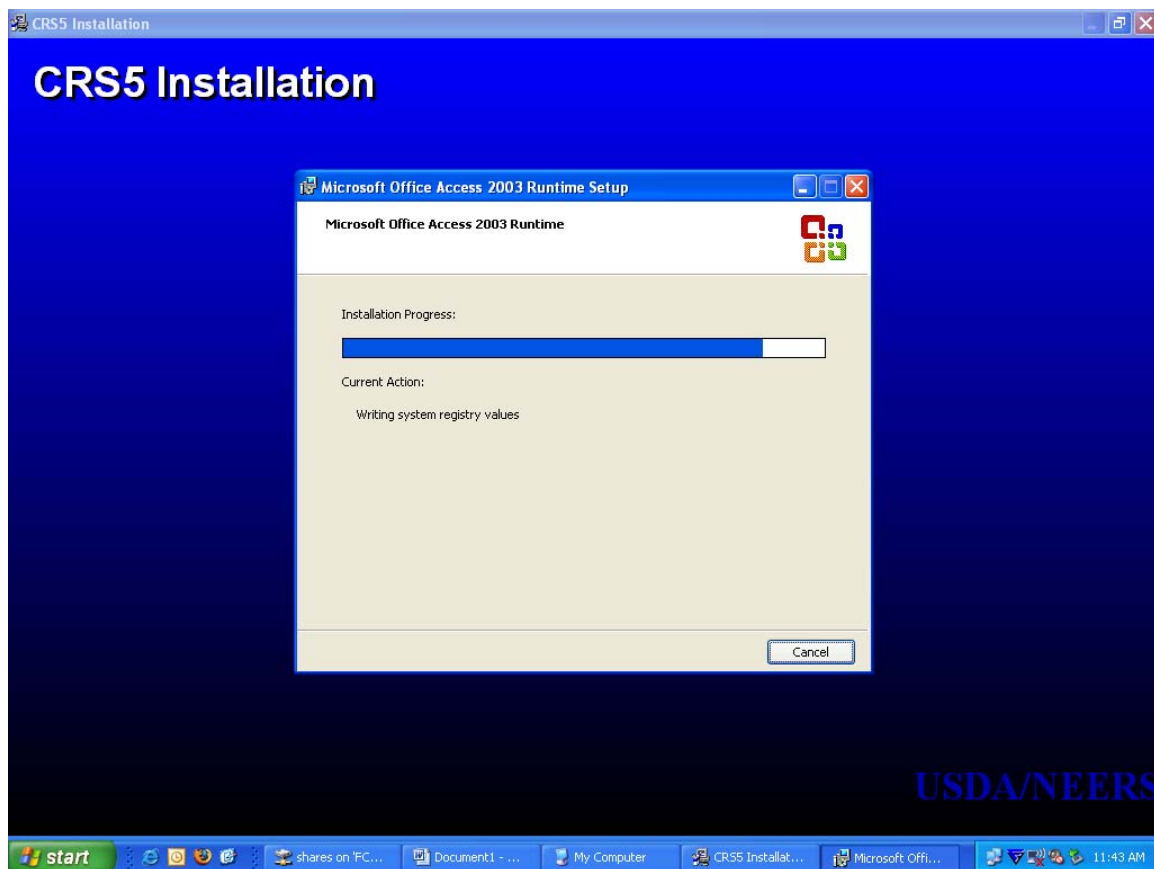
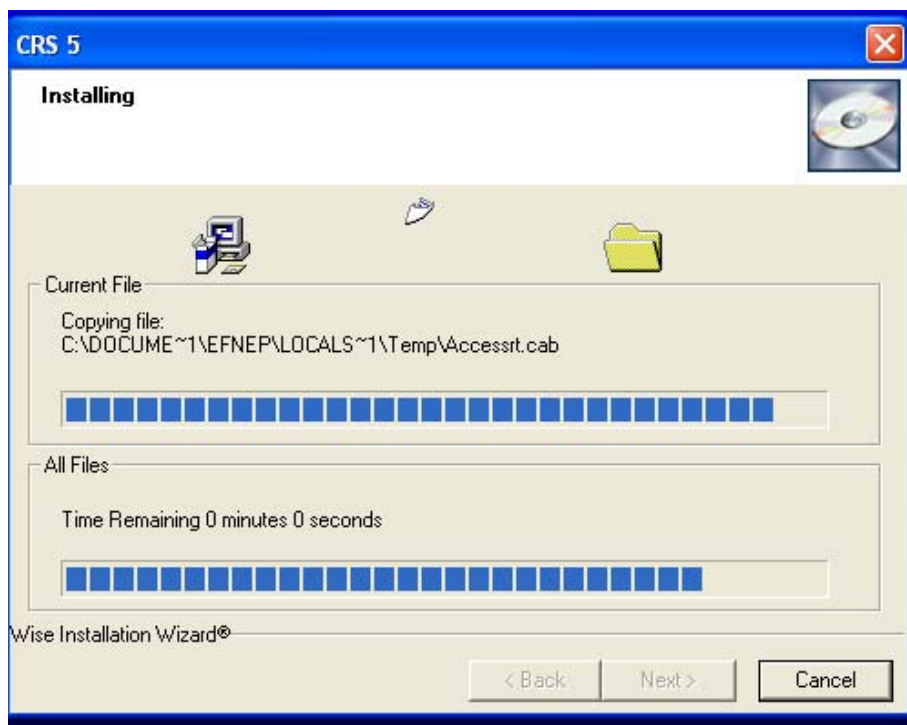


- Click **NEXT**

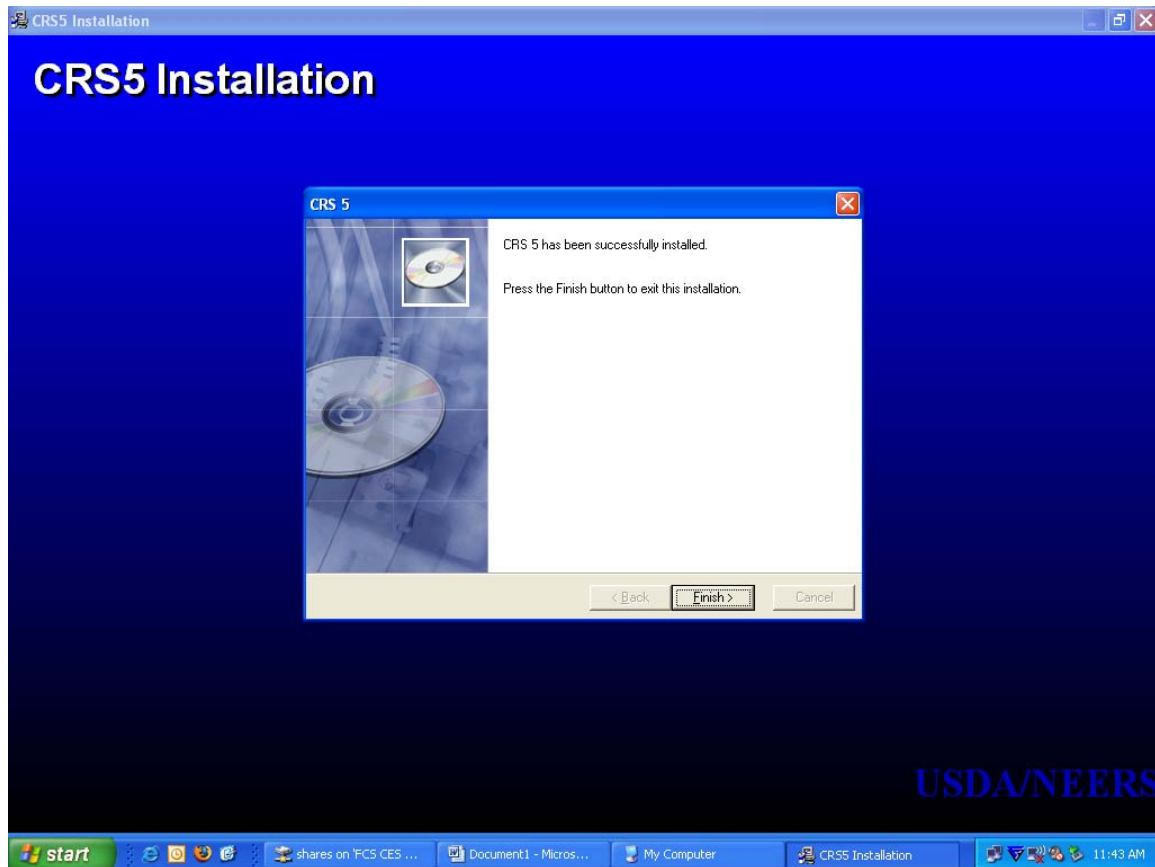


- Click **NEXT**





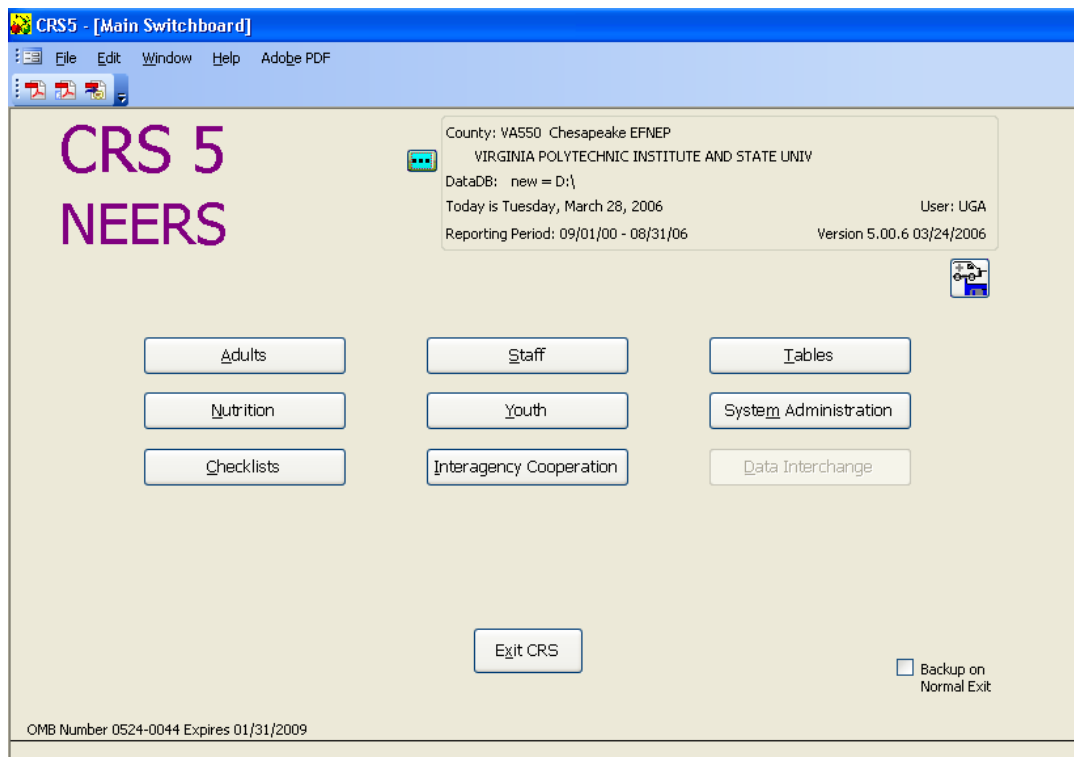
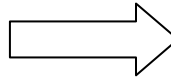
- Click FINISH



3. First Time Log-In for CRS5

After you have successfully completed installing CRS5, you can LOG IN.

- **Open the CRS5 Program and you will be asked for a NAME & PASSWORD**
 - The icon will look like this
- **The default Name is ERS**
- **The default Password is ERS**
 - Both are case sensitive
- **You should now be in the CRS Program on the main switchboard**



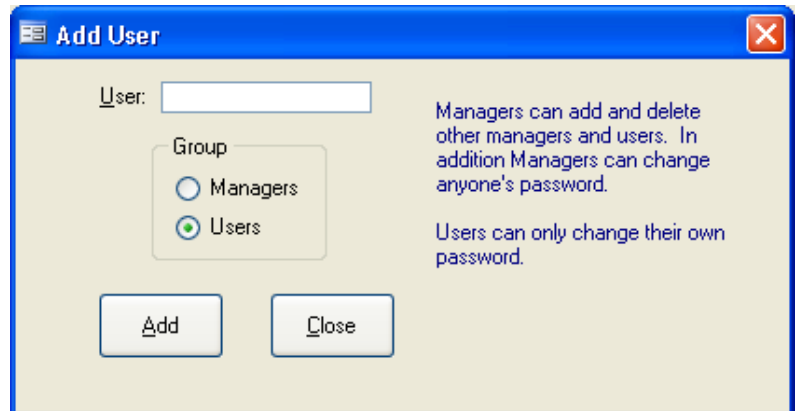
3.1. Creating New Users and Passwords

User Names and Passwords do not convert over from ERS4 to CRS5. You must create new users and passwords in the new system.

Directions for Entering New Users and Changing Passwords

Open CRS (Looking at Main Switchboard)

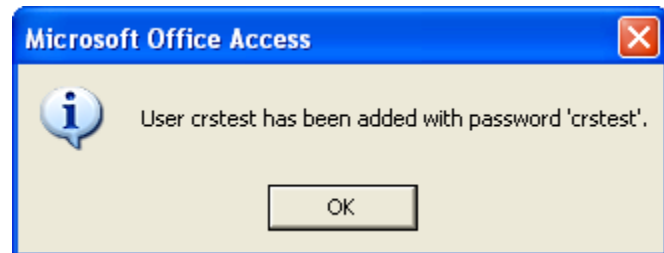
- System Administration
- Security Functions
- Add User
- Type a User Name in the top box
- Select the appropriate group for this user (Manager or User)
- Add



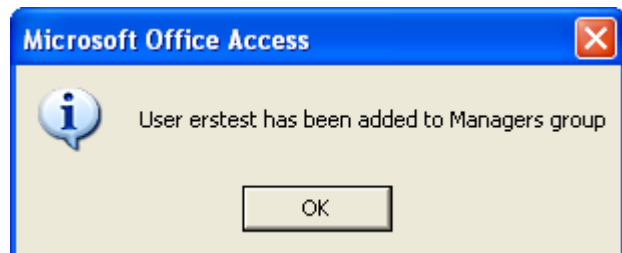
The 'Add User' dialog box has a title bar with a close button. It contains a 'User:' text box, a 'Group' section with radio buttons for 'Managers' and 'Users' (where 'Users' is selected), and two buttons at the bottom: 'Add' and 'Close'. On the right side, there is explanatory text: 'Managers can add and delete other managers and users. In addition Managers can change anyone's password.' and 'Users can only change their own password.'

You will then get a message that says a user _____ has been added with password _____ (The same as the user name but in all lower case letters)

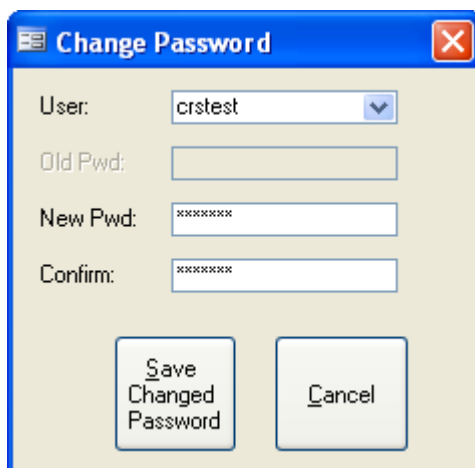
- Click OK
 - This is the default password. You must log out and log back in to change the password.
- OK – This message simply tells you that your user name has been added to the "Managers" Group
 - Change Password
 - Type in New Password and Confirm
 - Save Changed Password
 - OK
 - Back out to the Main Switchboard



A 'Microsoft Office Access' message box with an information icon. The text reads: 'User crstest has been added with password 'crstest'.' There is an 'OK' button at the bottom.



A 'Microsoft Office Access' message box with an information icon. The text reads: 'User erstest has been added to Managers group'. There is an 'OK' button at the bottom.



The 'Change Password' dialog box has a title bar with a close button. It contains four text boxes: 'User:' (with a dropdown menu showing 'crstest'), 'Old Pwd:', 'New Pwd:', and 'Confirm:'. The 'New Pwd:' and 'Confirm:' boxes have masked characters (asterisks). At the bottom are two buttons: 'Save Changed Password' and 'Cancel'.

NEW Terminology in CRS5: The new terms Managers and Users are equivalent to Executive Level and Data Entry Level from ERS4.

- **MANAGERS** have total access to change the passwords of any user without knowledge of their old password. Managers can also add and delete users.
- **USERS** only have access to change their own password.

4. System Configuration

- On the “Main Switchboard” screen click on

System Administration

- Next click on

System Configuration

- On this screen there are five important things you will enter.

This information migrates from ERS4 if it was properly entered there. The following information is for setting up a NEW DB.

System Configuration

System Level: **County**

State: **VA**

Unit ID: **550**

Sub Unit:

System Use: **EFNEP**

Institution: **VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIV**

Unit Name: **Chesapeake EFNEP**

Period Begin: **01-Oct-2005**

Period End: **29-Sep-2006**

Poverty Level Table: **48 Contiguous States and DC**

Default Nutrition Method: **Computerized Analysis**

The Unit ID is your three digit county FIPS code, or other code as may be assigned you by your State. Use the FIPS Code Lookup to find your FIPS code.

FIPS Code Lookup: <http://www.itl.nist.gov/fipspubs/co-codes/states.htm>

The Sub Unit is used to distinguish between multiple units in a county.

If the System Use is EFNEP, you must identify your state's institution. If your institution is not on the list, use one of the three Temporary institutions at the end of the list.

Use the contiguous-states-and-D.C. guidelines if you are in Puerto Rico, the U.S. Virgin Islands, American Samoa, Guam, the Republic of the Marshall Islands, the Federated States of Micronesia, the Commonwealth of the Northern Mariana Islands, or Palau.

Save **Cancel**

- Select your state from the drop down menu
 - Enter the Unit ID that corresponds with the county you are in. The county ID codes can be found at <http://www.itl.nist.gov/fipspubs/co-codes/states.htm>
 - Choose the correct use of this system by determining if it is for EFNEP or NON-EFNEP use
 - Choose your Institution from the drop down menu if this DB is for EFNEP use. The Institution box will disappear if you choose NON-EFNEP.
 - Enter the county name in the “Unit Name” box
 - For example Chesapeake EFNEP would enter
 - Unit ID - 550
 - Unit Name – Chesapeake EFNEP
- Check the Period Begin and Period End Dates. The current year is Fiscal Year 2006.
 - The beginning date for this reporting period is **Oct. 1, 2005**.
 - The end date will be **Sept. 31, 2006**.

- Choose which Poverty Level Table you will be using by clicking on one of the three choices: 48 Contiguous States and DC, Alaska, or Hawaii.

- The Default Nutrition Method allows you to choose which method will compute your nutrition information. This

Default Nutrition Method:

Computerized Analysis
Food Group Intake
External Analysis

determines the Default Nutrition Method for your state. When the first recall for an adult is entered, the system will prompt for the method to be used for that individual, with the one selected here as the default.

- Choose Computerized Analysis or Food Group Intake.
- Do not choose External Analysis. This method was created for the conversion process from ERS4 to CRS5 and should not be used as a Default Nutrition Method.

- After you have entered all of the preceding information correctly click

Save



- Back out to the Main Switchboard

5. Converting ERS4 to CRS5

States may choose one of two options when it comes to converting ERS4 data to CRS5. This is an either/or scenario.

- Option 1 - All county data sent to the state office is converted at the state office and the new CRS5 databases are then sent to the counties.
- Option 2 – All counties do their own database conversions.

Directions for both options follow.

5.1. Option 1: State Level Conversion

1. Back Up County Data in ERS4
2. Renaming your ERSDAT40.ZIP file
3. Send file via e-mail to the state office
4. Install CRS5 at State Level
5. Install CRS5 in County
6. Converting DBs from ERS4 to CRS5
7. Backing up CRS5 DB in CRS Tools
8. County Restoration of .ZIP file *

*While the state data coordinator has the data they can convert each county DB. Then the state data coordinator can e-mail the converted DB back to the county and have them restore the file – which is a familiar process from ERS4.

5.1.1. Back Up County Data in ERS4

Counties should:

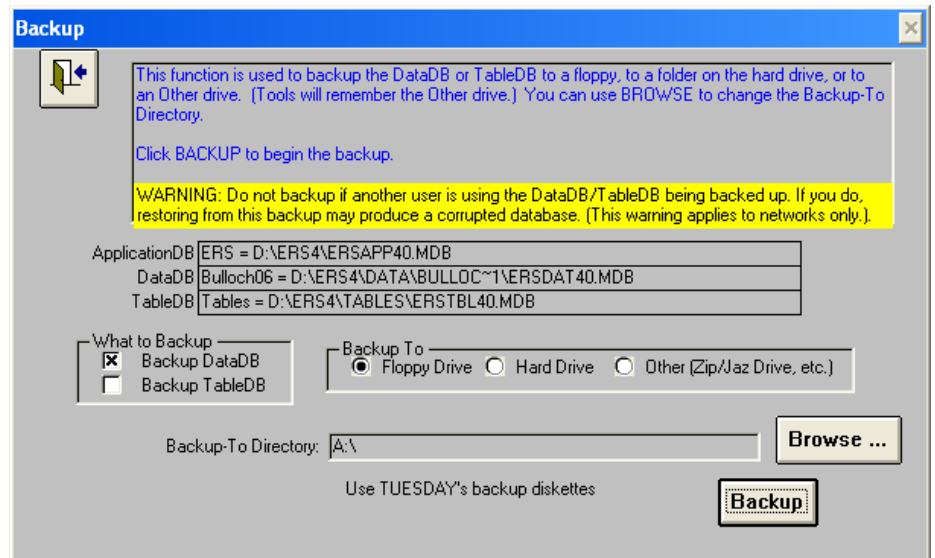
- Log into ERS4



- Go to ERS Tools (the Ambulance Icon to the right of the screen)
- Make sure you are attached to the DB that you want to back up
- Click - Repair/Compact Data DB
- "OK"

- Backup

- Insert a Floppy Disk – or you can change the path to save it to your hard drive. If you do this click browse and find the folder where you want to back up your file.
 - Click - Backup
 - "Yes" (To delete all files from ROOT directory)
 - "OK" (Note: it takes only 1 disk)
 - "OK"



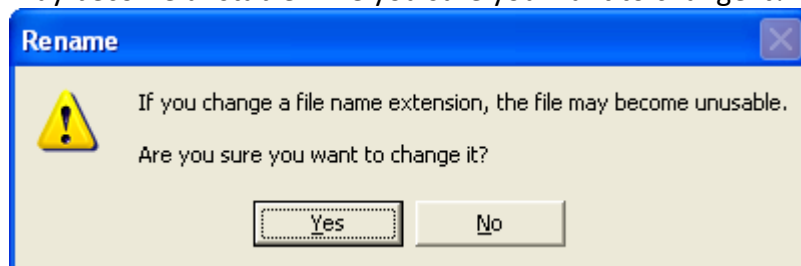
Restore – this is to test the DB that you just backed up – this is optional

- "Next"
- "Test"
- "OK"
- "Cancel"
- "Back" door (in upper left corner)
- Exit

5.1.2. Renaming your ERSDAT40.ZIP file

This step may not be needed in all states. Some e-mail systems are rejecting .ZIP files and you may experience problems trying to send .ZIP files through e-mail for backup purposes.

- From the desktop screen on your computer double click on “My Computer”
- Open up the 3 ½ Floppy (A:\)
- RIGHT Click on the ersdat40.zip file and you will see a menu
 - Click on “Rename” towards the bottom of the list
 - Rename the file **ERSDAT40.ZIP.RemoveThis** – (again this is just a suggestion – you can choose any neutral file extension you wish)
 - Next a screen will come up and say “If you change a file name extension, the file may become unstable. Are you sure you want to change it?”



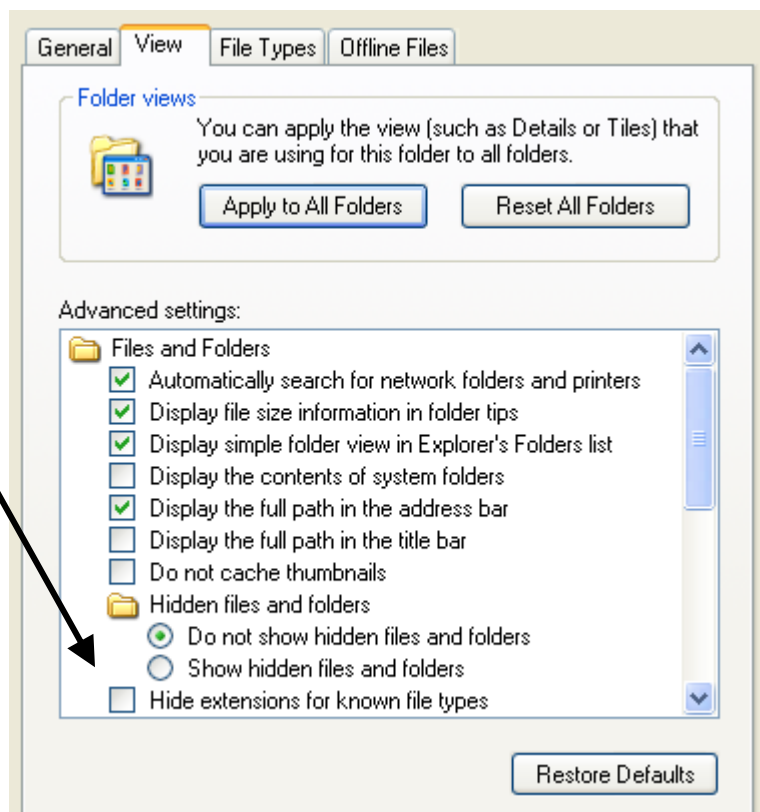
- Click YES

5.1.3. E-mail this file to the state EFNEP data coordinator

- You may now attach this ersdat40.zip.RemoveThis file to an e-mail and send to the appropriate person.
- **Be sure “Ersdat40.ZIP.RemoveThis” comes up under “current attachments”**

Please make sure that you can see the extensions for known file types. From your My Documents folder go to

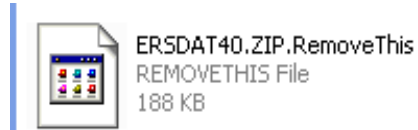
- Tools
- Folder options
- View
- Under Advanced Settings make sure the box that reads “Hide Extensions for known file types” is **UNCHECKED**
- This will help you in the renaming process to make sure that you are changing the correct extension.



A file with the .ZIP extension looks like this



A file renamed with the .ZIP.RemoveThis will look like this



Save this file to a floppy disk and send to your state data coordinator or save this file to your hard drive and attach it to an e-mail to your state data coordinator. You do not need to change the .ZIP file extension if you are not e-mailing the file.

5.1.3. Install CRS5 at the State Level

See instructions in section 2 of this manual

5.1.4. Install CRS5 at the county level

The program CD should be obtained from your state office.

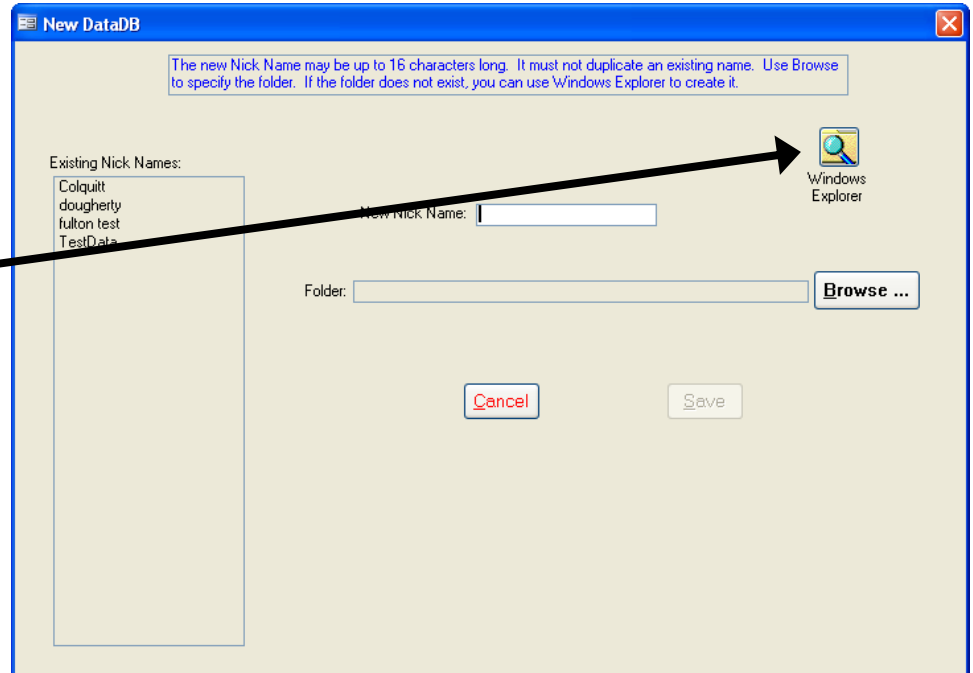
Install the program using previous directions given in section 2 of this manual.

5.1.5. Converting DBs from ERS4 to CRS5

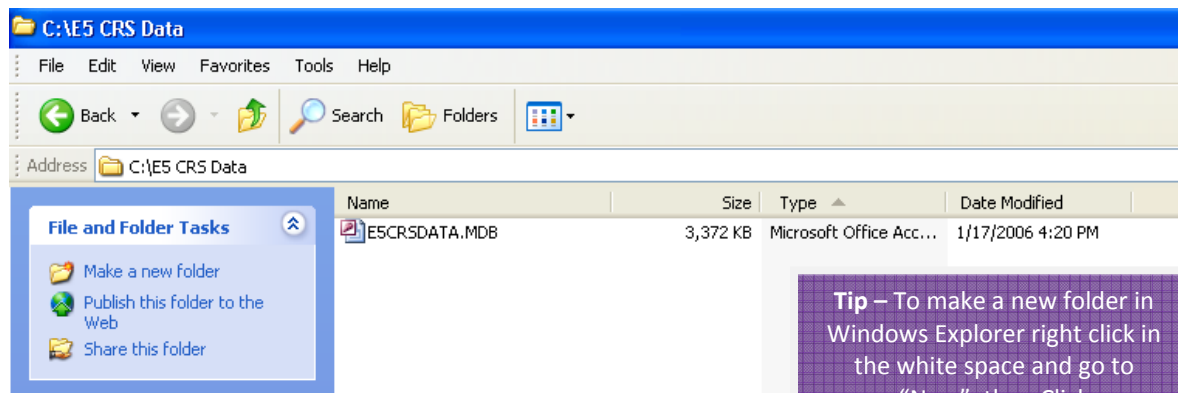
Creating a Folder for conversion

- System Administration
- DataDB
- New DB
- Click on Windows Explorer

The Windows Explorer icon in CRS5 works!! You can use this icon to access Windows Explorer outside of CRS5 if you need to add folders or check files locations.

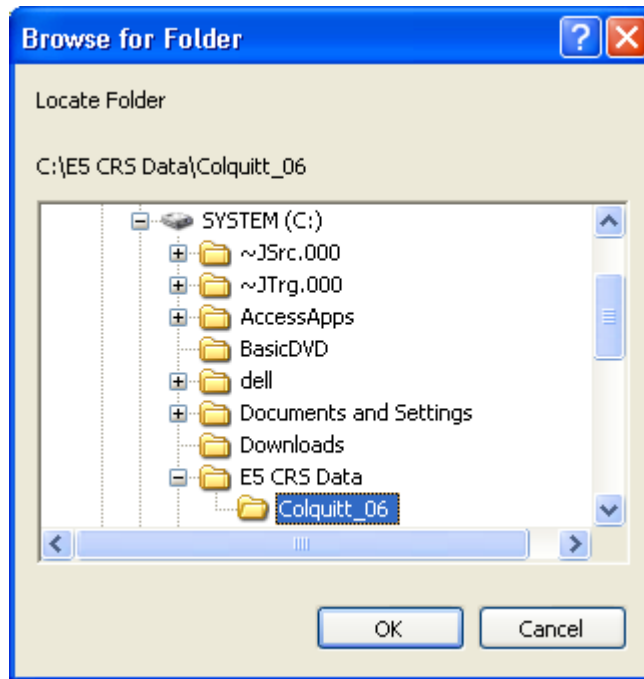


- Windows Explorer will open up in a new window
- Find the location C:\E5 CRS Data This is the default folder CRS5 created and this is the location you should use to store your DBs. When you are finished making folders you can "X" out or close Windows Explorer

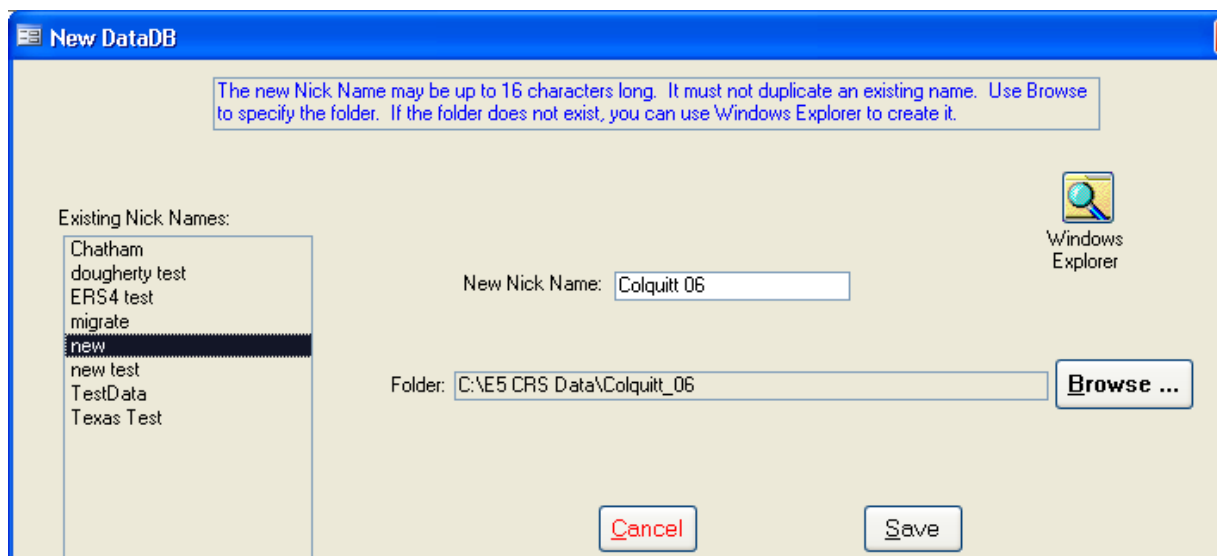


Tip – To make a new folder in Windows Explorer right click in the white space and go to "New"; then Click "Folder" and your new folder will appear and you can give it a proper name.

- Go back to your task bar and maximize CRS5; you should be on the screen where we left off
 - Enter Nick Name
 - Click Browse
 - Now locate the folder that you just created – in this case it was C:\E5 CRS Data\Colquitt_06

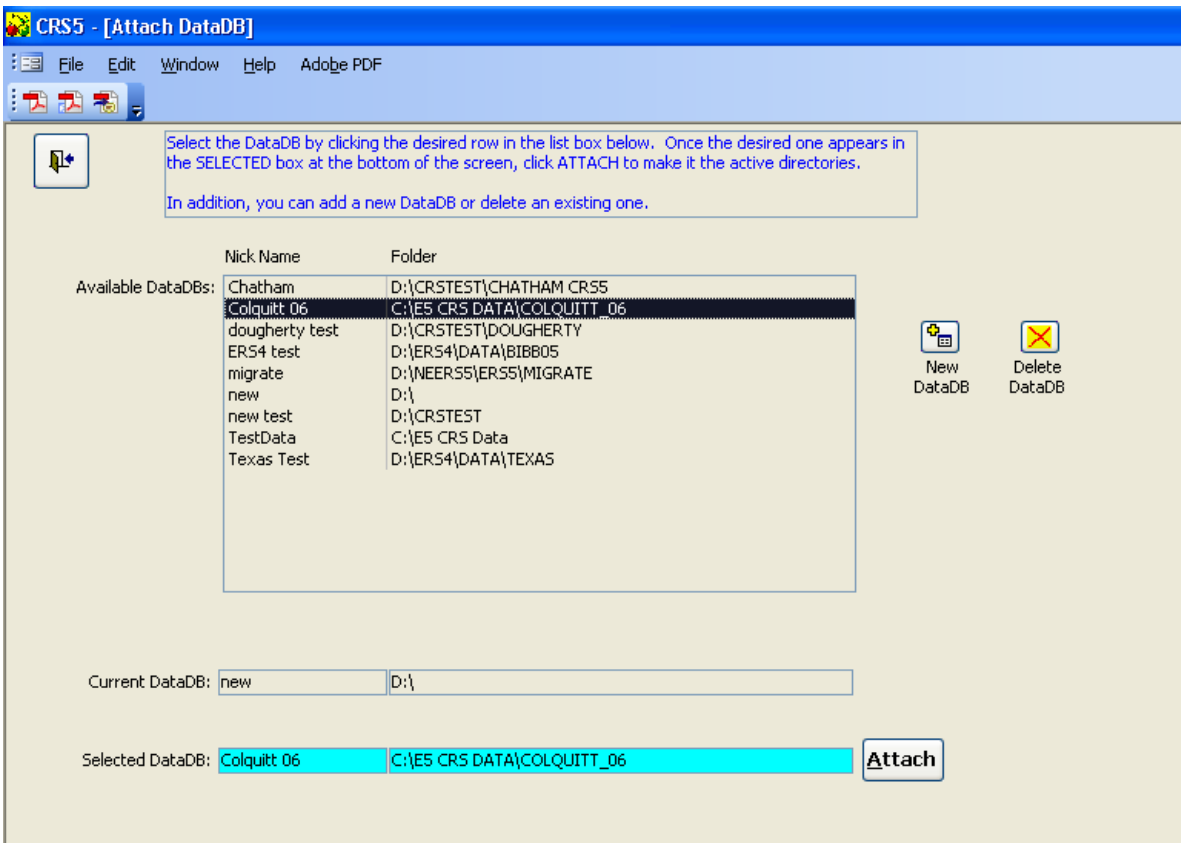


- Click **OK**

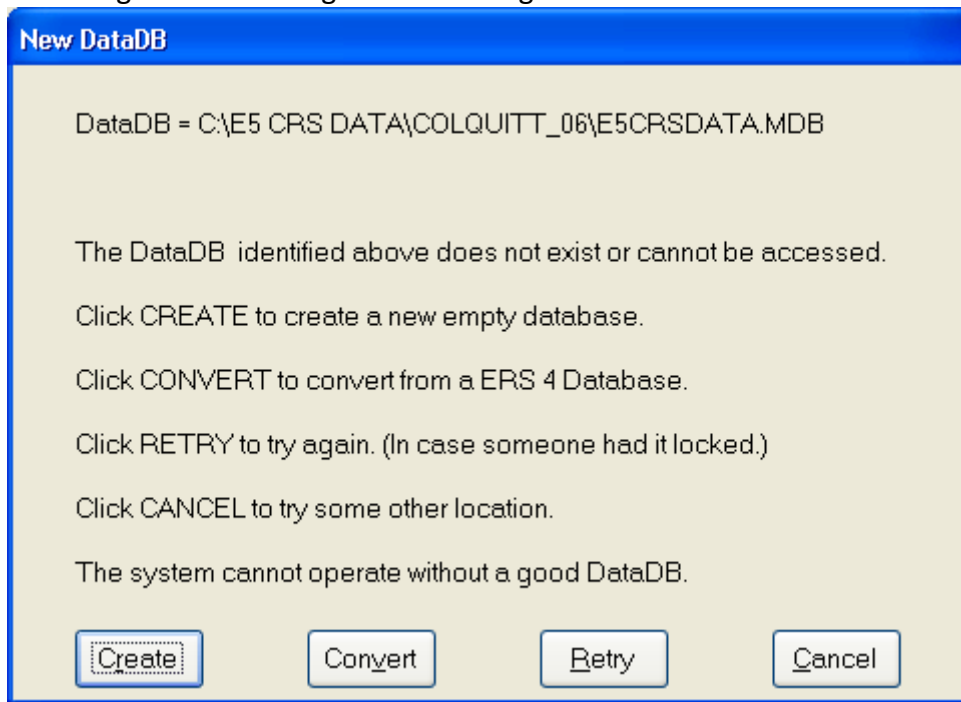


- Click **SAVE**

- Now highlight the DB that you just created and click **ATTACH** at the bottom of the screen

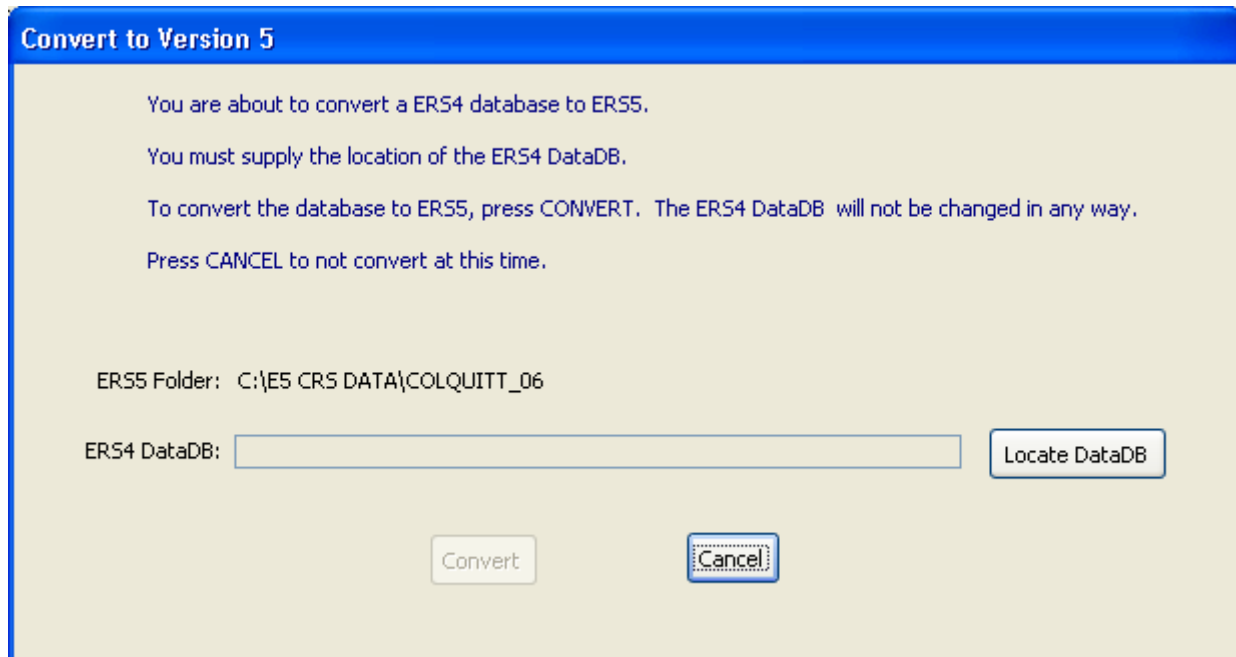


- You will get the following screen message:

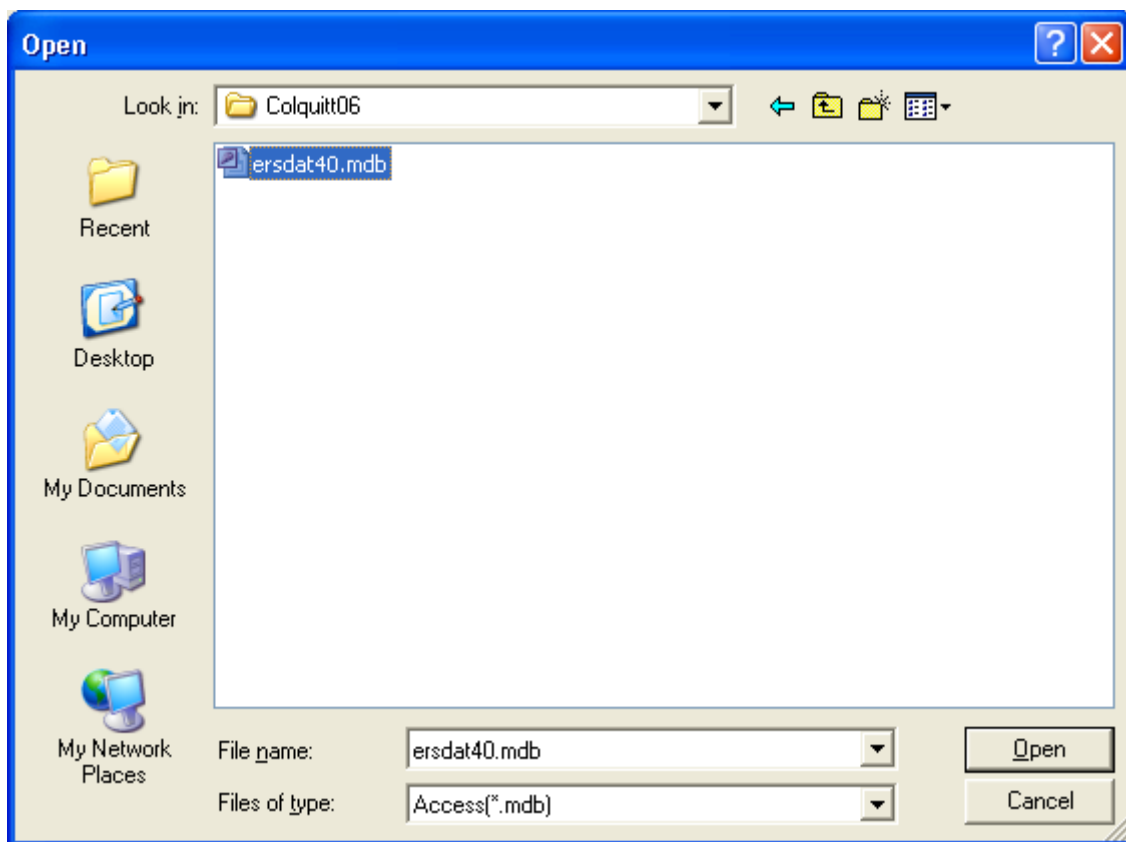


- Click **CONVERT**

- Now click **“Locate DataDb”** to search for the location where your ERS4 files were located

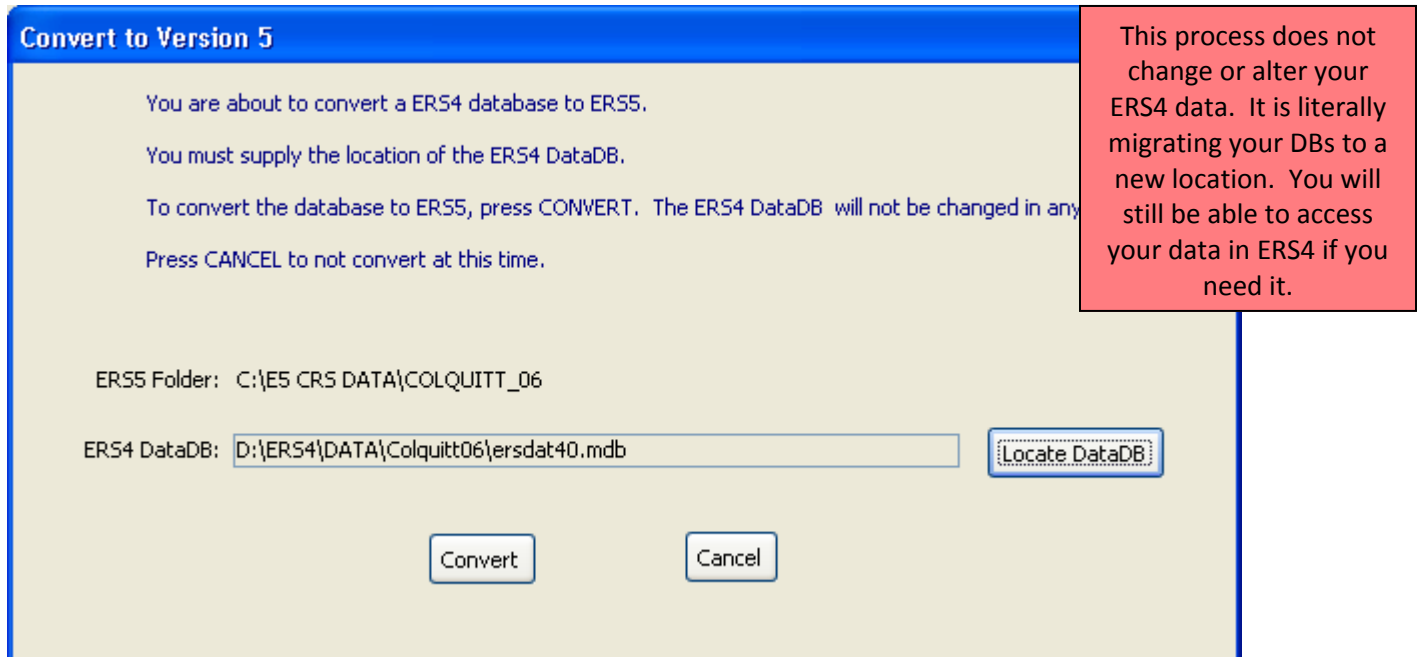


- I want to convert Colquitt 06 so I am going to find the file in ERS4 that was the Colquitt 06 data.
- You are looking for the folder that contains your data. The file you need is **ersdat40.mdb**



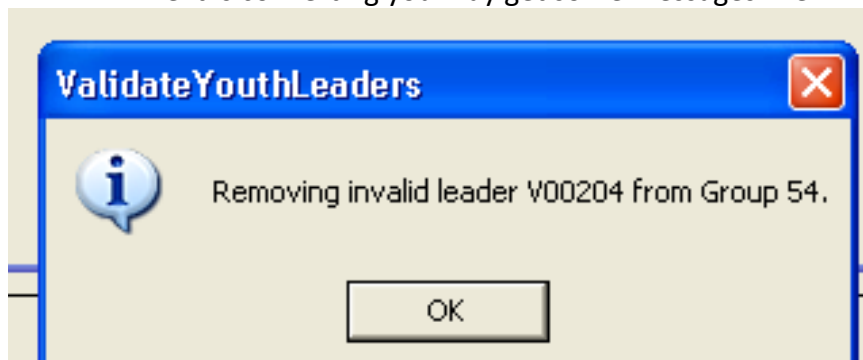
- When you have located the file highlight it and click **OPEN**

- It is very important to make sure that the correct file path shows up on this screen.



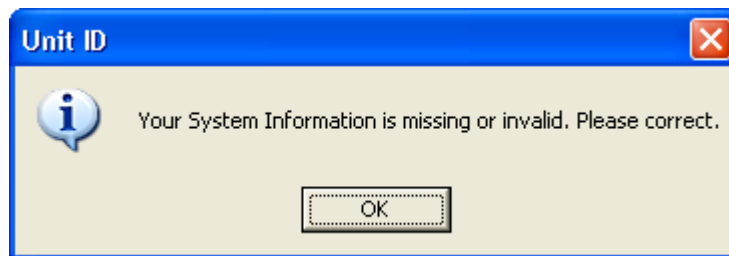
- After you have verified that the ERS4 Data DB is the correct file click **CONVERT**

- While it is converting you may get some messages like:



- This is due to a flaw in ERS4 that allowed deletion of a paraprofessional or volunteer who was the leader of a group. CRS5 cannot have a youth leader who is not in the staff (professional, paraprofessional, volunteer) table. If it encounters a non-existent leader, it is removed from the list of leaders for that group. If you have leaders that are removed during this process they will need to be re-entered in CRS5 once this process is complete.
- Click **OK** and let it continue the process

- When the process is finished it will take you back to the “Main Switchboard”
- You should receive an error telling you that your System Information is missing.
 - Click **OK**



- You are missing the Institution name. Highlight your institution from the drop down menu.

 A screenshot of the "System Configuration" window. The window has a blue title bar with the text "System Configuration" and a series of buttons (S, W, O, R, F, B, C, D, I) and a close button. The main area is light gray and contains several fields and a large list box.

System Level: **County**

State:

Unit ID:

Sub Unit:

System Use: **EFNEP** (highlighted)

Institution: **VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIV** (highlighted in the dropdown list)

Unit Name: UNIVERSITY OF CALIFORNIA-BERKELEY

Period Begin: UNIVERSITY OF CALIFORNIA-DAVIS

Period End: UNIVERSITY OF CALIFORNIA-RIVERSIDE

Poverty Level Table: UNIVERSITY OF CONNECTICUT

Default Nutrition Method: UNIVERSITY OF DELAWARE

The Unit ID is your three digit county FIPS code, or other code as may be assigned you by your State. Use the FIPS Code Lookup to find your FIPS code.

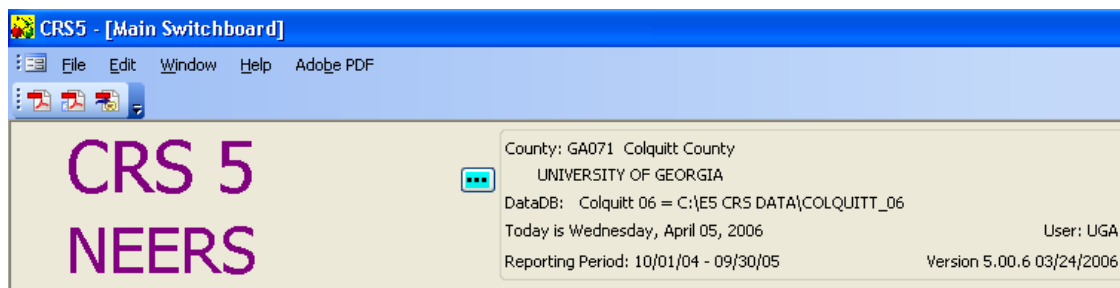
FIPS Code Lookup: <http://www.itl.nist.gov/fipspubs/co-codes/states.htm>

The Sub Unit is used to distinguish between multiple units in a county.

If the System Use is EFNEP, you must identify your state's institution. If your institution is not on the list, use one of the three Temporary institutions at the end of the list.

If you are in Puerto Guam, the Republic of Micronesia, the , or Palau.

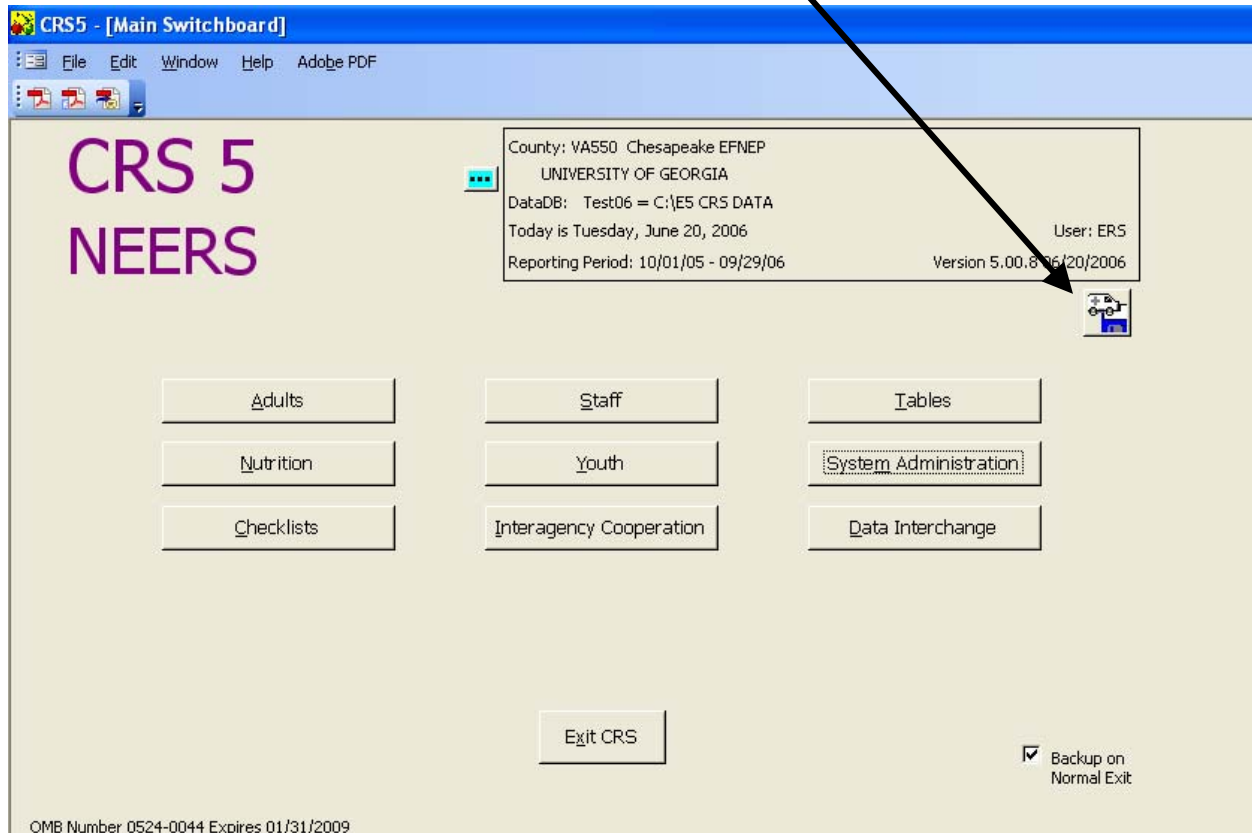
- Verify the other information and click **SAVE**.
- You can now verify which DB you are attached to by looking in the top box



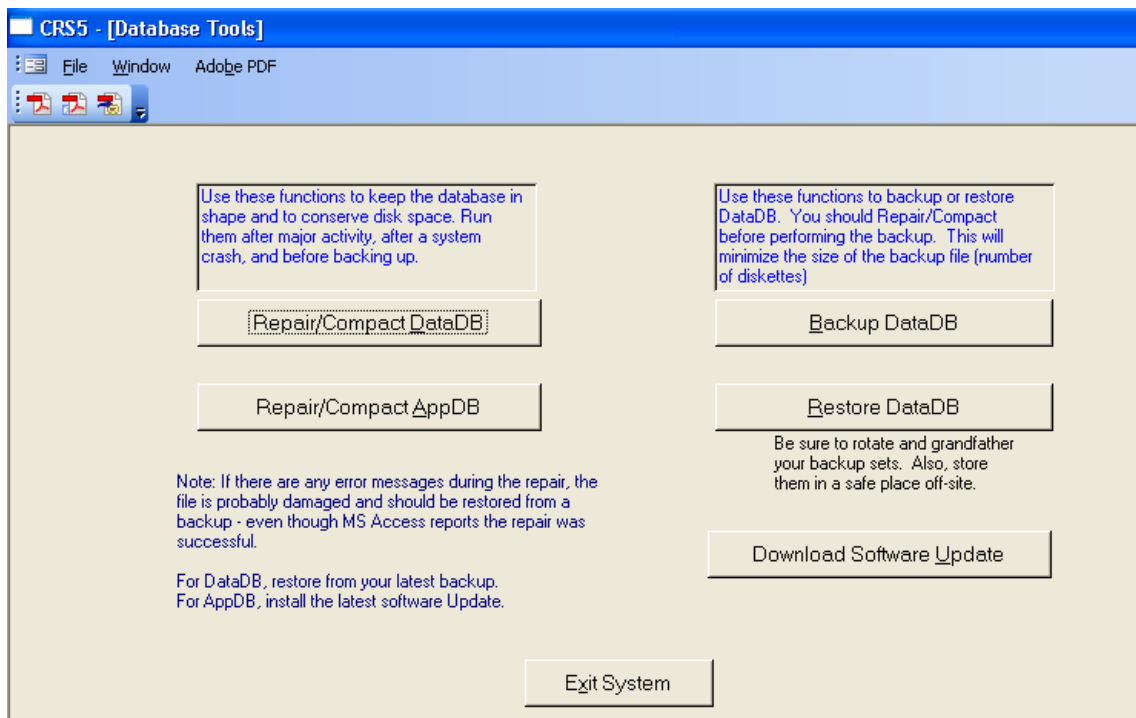
5.1.6. Backing up CRS5 DB in CRS Tools

Once you have successfully converted a DB go to ERS tools to back it up.

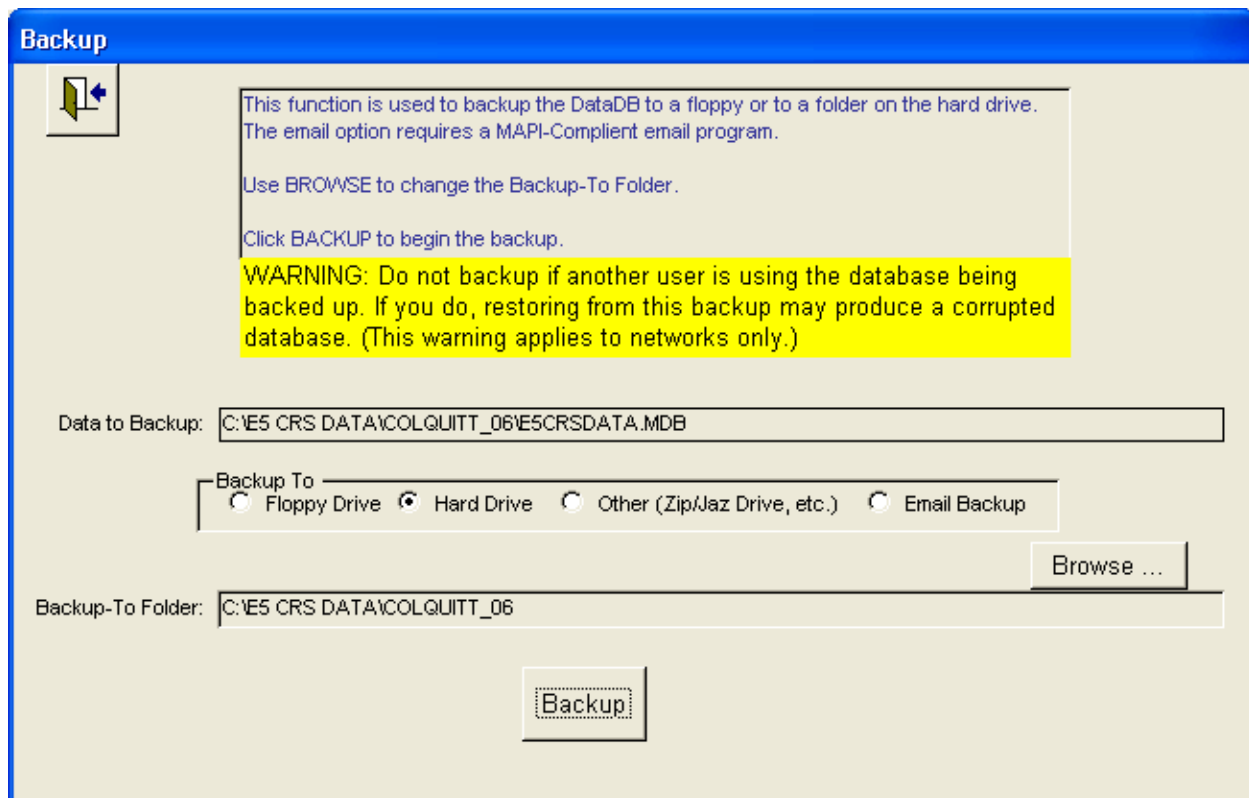
- Click on the Ambulance/Disk icon



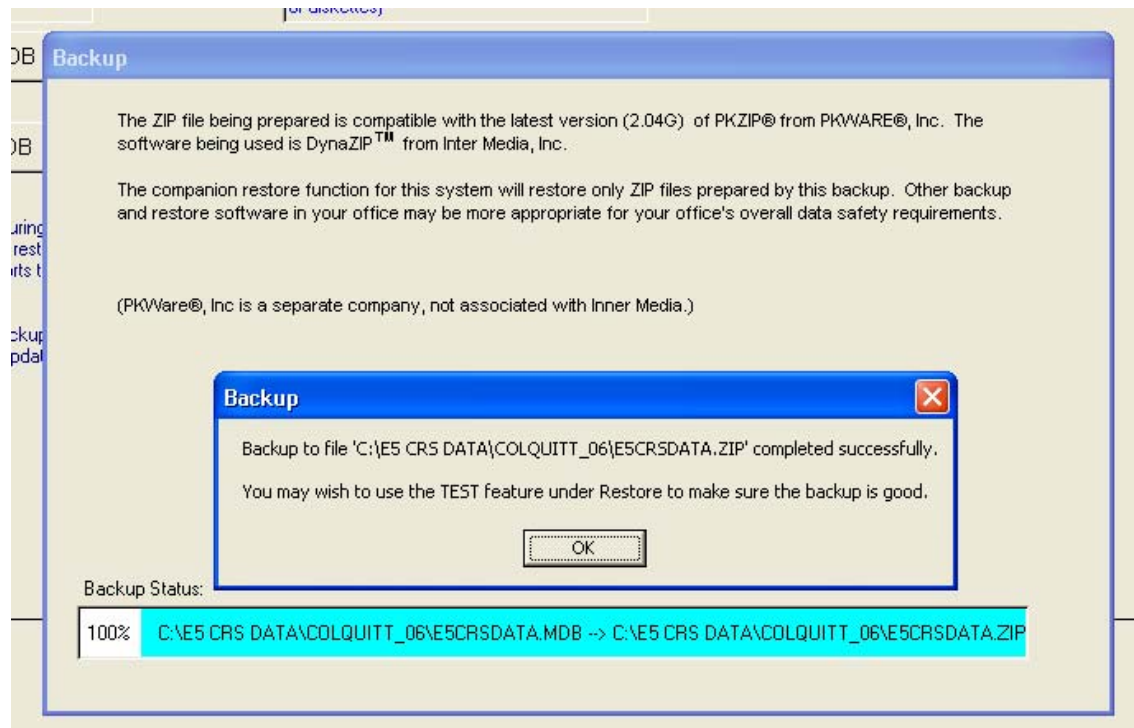
- Enter your password, if needed
- Click on **BACKUP DATADB**



- Since this is a .ZIP file you can back it up into the folder where the DB is currently located. This could help you remember where the files are stored.



- After you have chosen the appropriate folder click **BACKUP**
- The next screen message will appear like this



- Click **OK**

- If you wish to test this backup file go to **RESTORE**
 - Find the appropriate file and click **NEXT**
 - Click **TEST**



- Click **OK**
- **BACK DOOR**

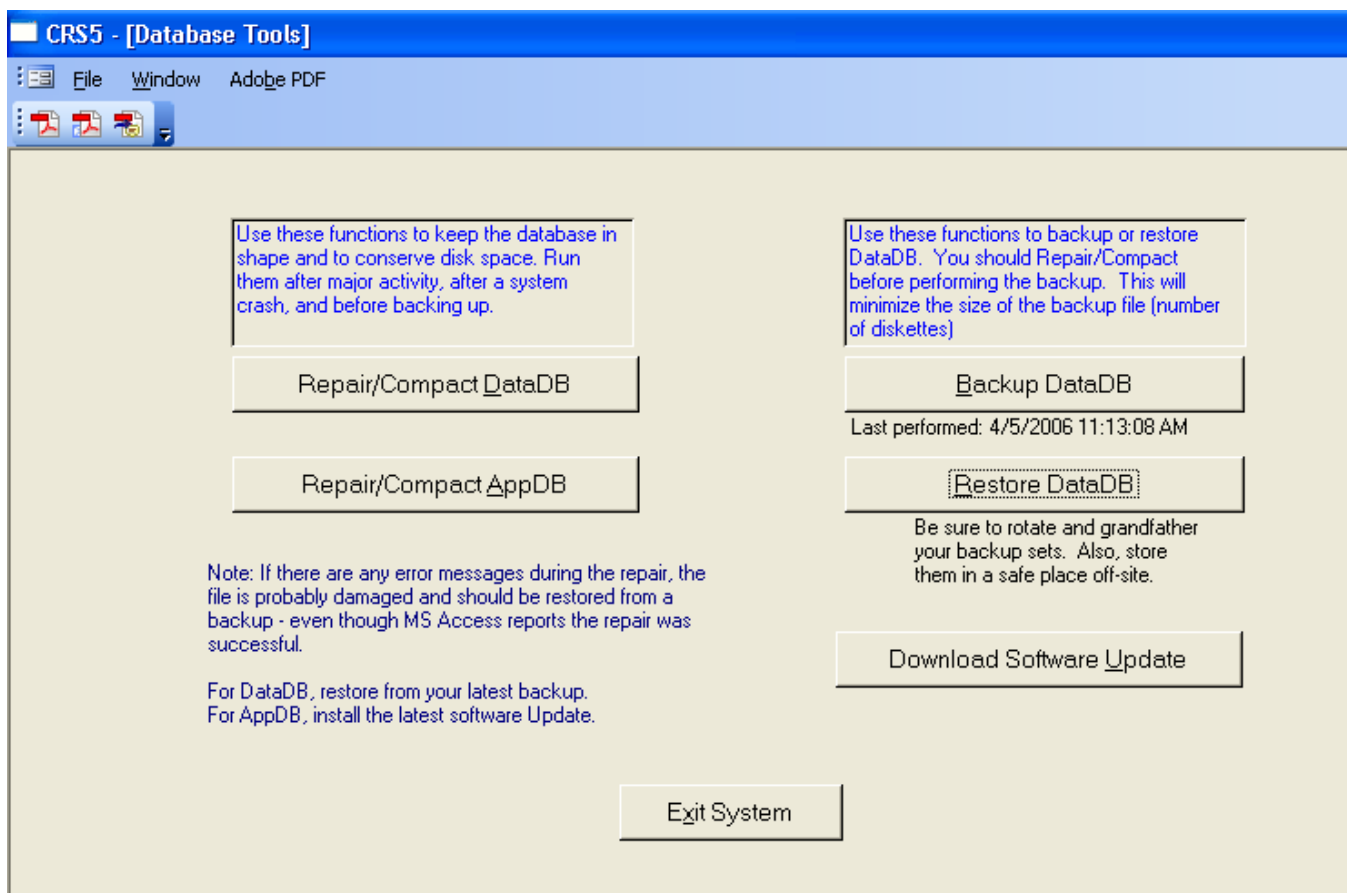
When you are finished backing up all of your county DBs click **EXIT SYSTEM**

E-mail each .zip file to the appropriate county level person.

If you need to rename the zip file see Renaming .ZIP Files in section 5.1.2.


5.1.7. County Restoration of .ZIP File

- Save the .ZIP file that was received via e-mail to the c:\E5 CRS Data folder that was created during CRS5 installation.
 - Counties may need to create folders by years within this folder to help keep data organized (i.e. c:\E5 CRS Data\Colquitt_06 or C:\E5 CRS Data\Colquitt_07)
 - If the .ZIP extension was renamed during e-mail process make sure that when you save the file now you restore it to its original sate.
 - The file should be named **E5CRSDATA.ZIP**
- Log into CRS5
- Go to CRS Tools by clicking the ambulance icon.
- Click **RESTORE DATA DB**



- Choose the correct “Restore-From File” path by clicking **LOCATE**
- Once you have found the correct path where the .ZIP file is stored click **NEXT**

Restore



This function is used to restore the DataDB from a backup.

Use **LOCATE** or **USE BACKUP LOG** to locate and select the ZIP file for the restore. Then click **NEXT**.

Note: This function restores (unZips) only ZIP files prepared by this system. ZIP files prepared by other means do not have the necessary information about the file for a safe restore.

Restore-From File:

- Choose the correct “Restore-To Directory” path by clicking **BROWSE**
- Once this correct path has been chosen click **RESTORE**

Restore

Confirm this is the data to be restored. Then click **RESTORE** to start the restore (or test) operation.

Click **BROWSE** to restore to a different directory.

Use **TEST** to validate the backup without actually restoring.

Caution: Other users must not be using the Restore-To directory.

Backup Information

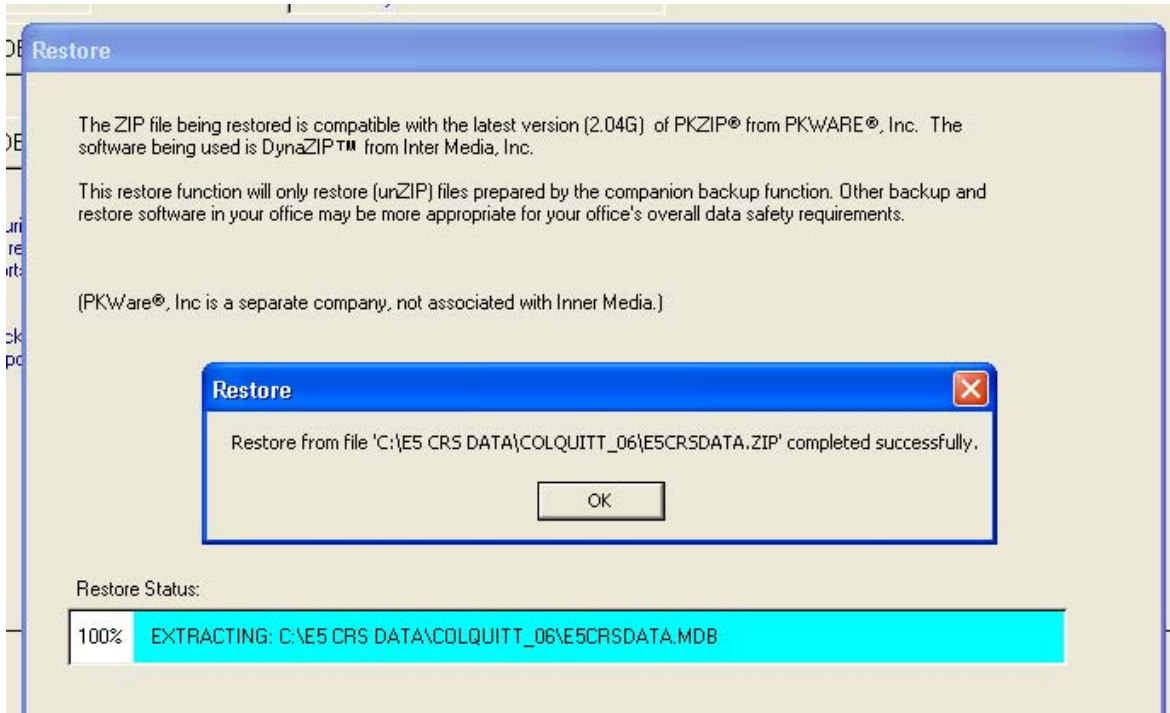
System:	CRS5		
From Path:	C:\E5 CRS DATA\COLQUITT_06\		
File:	E5CRSDATA.MDB		
Backup Date:	4/5/2006 11:13:07 AM	Level:	C
Software Version:	5.00.6 03/24/2006	Version:	D01

Restore-To Directory:

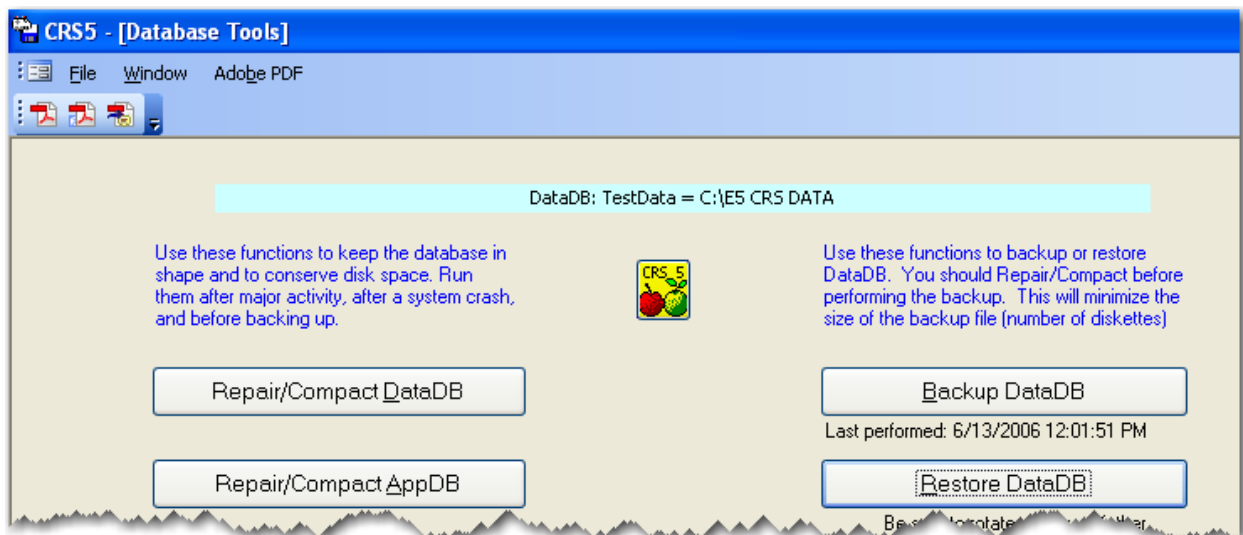
Before testing a 1 disk backup, remove and reinsert the diskette to force Windows to read from the diskette instead of from its in-memory copy of the disk.

It's a good idea to test before doing the restore.

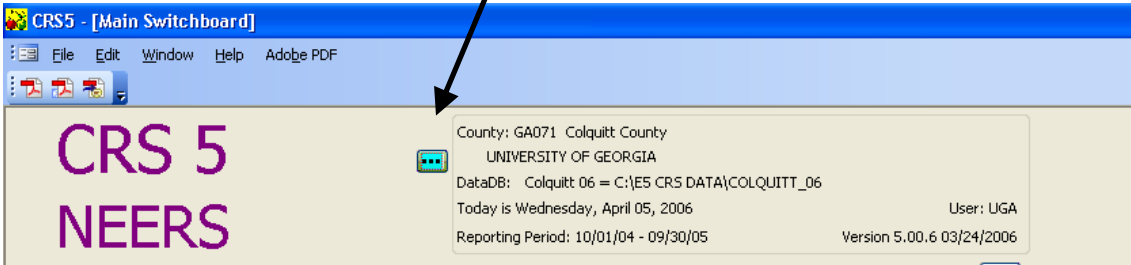
- Click **OK**



You are now back on the Database Tools screen (CRS5 Tools).
Click the CRS5 icon in the middle of the screen to return o CRS5.



- Once back into CRS5 click on the **BLUE EXPLODE** button near the top of the screen to go to the DB screen
- Highlight the DB you just restored in CRS5 Tools and click **ATTACH**



Verify the correct information in the top box.
If everything appears correctly the county is now ready to being entering data in
CRS5

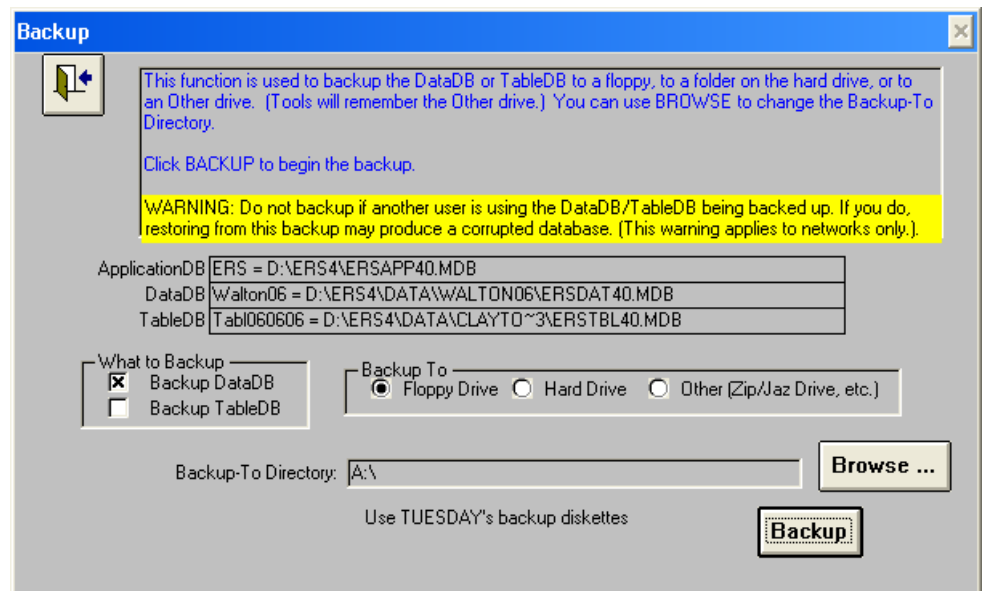
5.2 Option 2: County Level Conversion

1. Back Up County Data in ERS4
2. Renaming your ERSDAT40.ZIP file
3. Install CRS5 at the County Level
4. Convert DB from ERS4 into CRS5

5.2.1. Back Up County Data in ERS4

Counties should:

- Log into ERS4
- Go to ERS Tools (the Ambulance Icon to the right of the screen)
- Make sure you are attached to the DB that you want to back up
- Click - Repair/Compact Data DB
- “OK”
- Backup
 - Insert a Floppy Disk – or you can change the path to save it to your hard drive. If you do this click browse and find the folder where you want to back up your file.
 - Click - Backup
 - “Yes” (To delete all files from ROOT directory)
 - “OK” (Note: it takes only 1 disk)
 - “OK”



Restore – this is to test the DB that you just backed up – this is optional

- “Next”
- “Test”
- “OK”
- “Cancel”
- “Back” door (in upper left corner)
- Exit

5.2.2. Renaming your ERSDAT40.ZIP file

This step may not be needed in all states. Some e-mail systems are rejecting .ZIP files and you may experience problems trying to send .ZIP files for backup purposes.

- From the desktop screen on your computer double click on “My Computer”
- Open up the 3 ½ Floppy (A:\)
- RIGHT Click on the ersdat40.zip file and you will see a menu
 - Click on “Rename” towards the bottom of the list
 - Rename the file **ERSDAT40.ZIP.RemoveThis** – (again this is just a suggestion – you can choose any neutral file extension you wish)
 - Next a screen will come up and say “If you change a file name extension, the file may become unstable. Are you sure you want to change it?”
 - Click YES
- You may now attach this ersdat40.zip.RemoveThis file to an e-mail and send to the appropriate person.
- **Be sure “Ersdat40.ZIP.RemoveThis” comes up under “current attachments”**

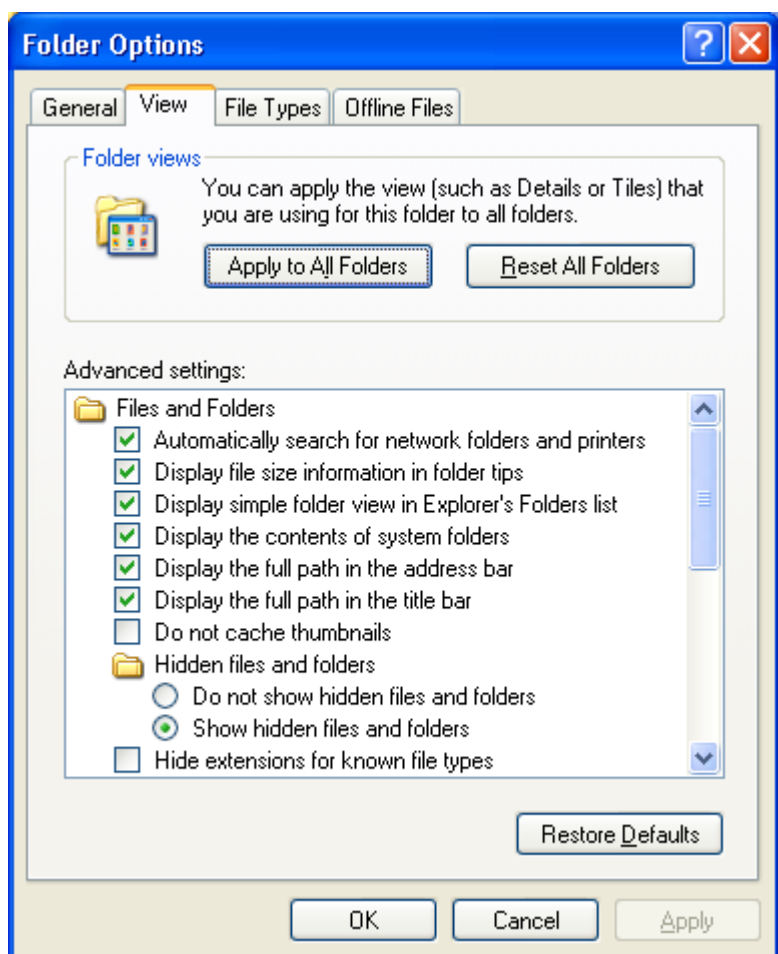
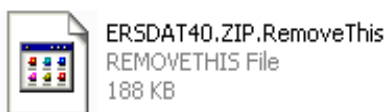
Please make sure that you can see the extensions for known file types. From your My Documents folder go to

- Tools
- Folder options
- View
- Under Advanced Settings make sure the box that reads “Hide Extensions for known file types” is UNCHECKED
- This will help you in the renaming process to make sure that you are changing the correct extension.

A file with the .ZIP extension looks like this



A file renamed with the .ZIP.RemoveThis will look like this



Save this file to a floppy disk and send to your state data coordinator or save this file to your hard drive and attach it to an e-mail to your state data coordinator. You do not need to change the .ZIP file extension if you are not e-mailing the file.

5.2.3. Install CRS5 at the county level

The program CD should be obtained from your state office.

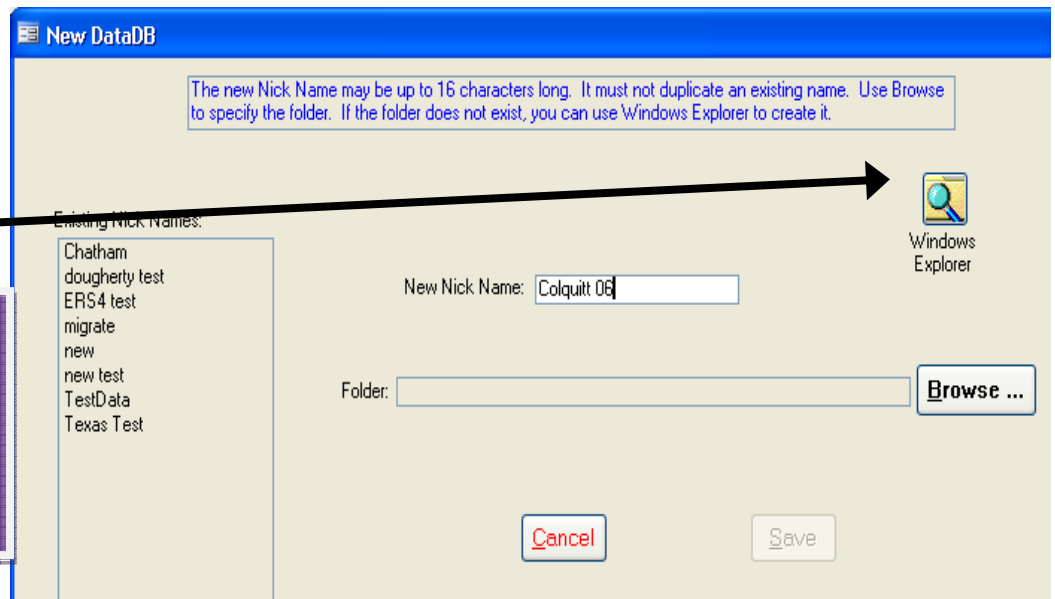
Install the program using previous directions given in Section 2 – Installing CRS5 from a CD

5.2.4. Converting DBs from ERS4 to CRS5

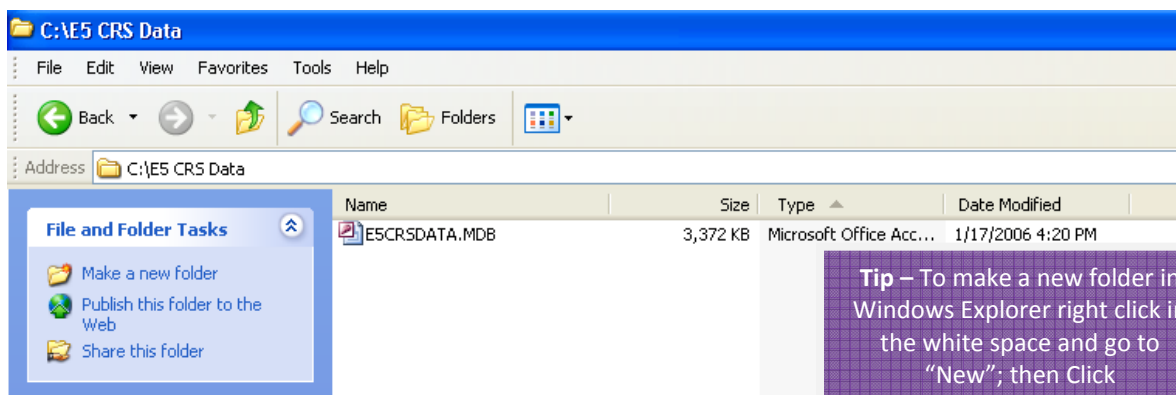
Creating a Folder for conversion

- System Administration
- DataDB
- New DB
- Click on Windows Explorer

The Windows Explorer Icon in CRS5 works!! You can use this icon to access windows explorer outside of CRS5 if you need to add folders or check files locations.

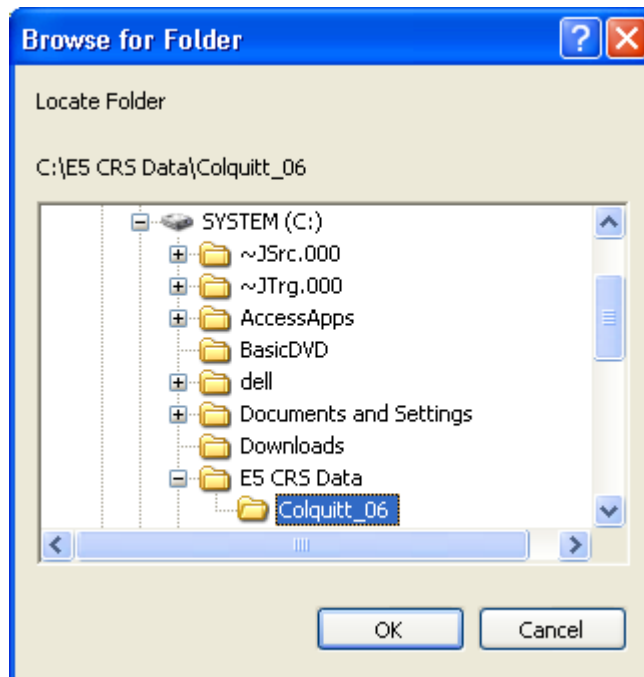


- Windows Explorer will open up in a new window
- Find the location C:\E5 CRS Data This is the default folder CRS5 created and this is the location you should use to store your DBs. When you are finished making folders you can “X” out or close Windows Explorer

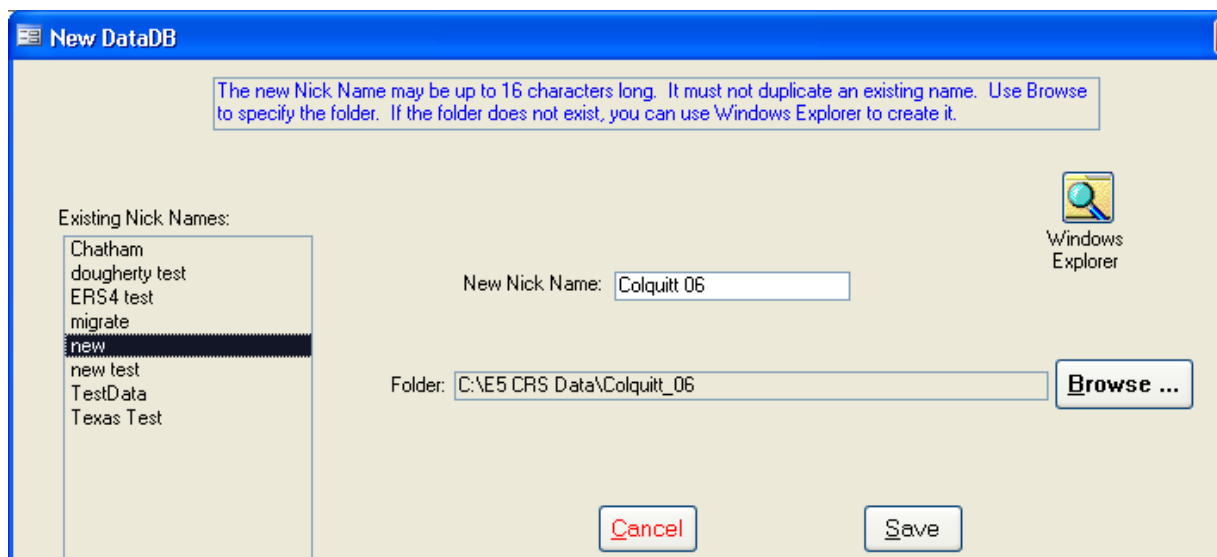


- Go back to your task bar and maximize CRS5; you should be on the screen where we left off
 - Enter Nick Name
 - Click Browse

- Go back to your task bar and maximize CRS5; you should be on the screen where we left off
 - Enter Nick Name
 - Click Browse
 - Now locate the folder that you just created – in this case it was C:\E5 CRS Data\Colquitt_06

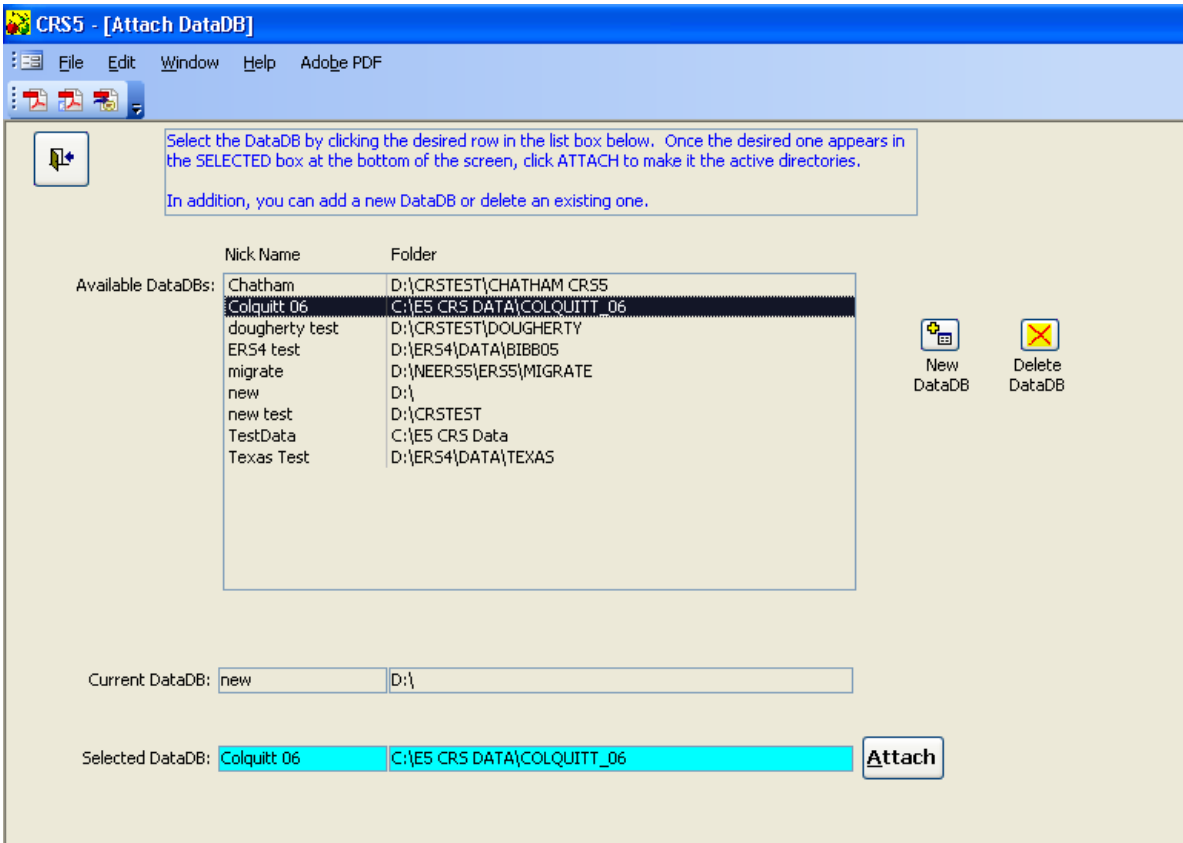


- Click **OK**

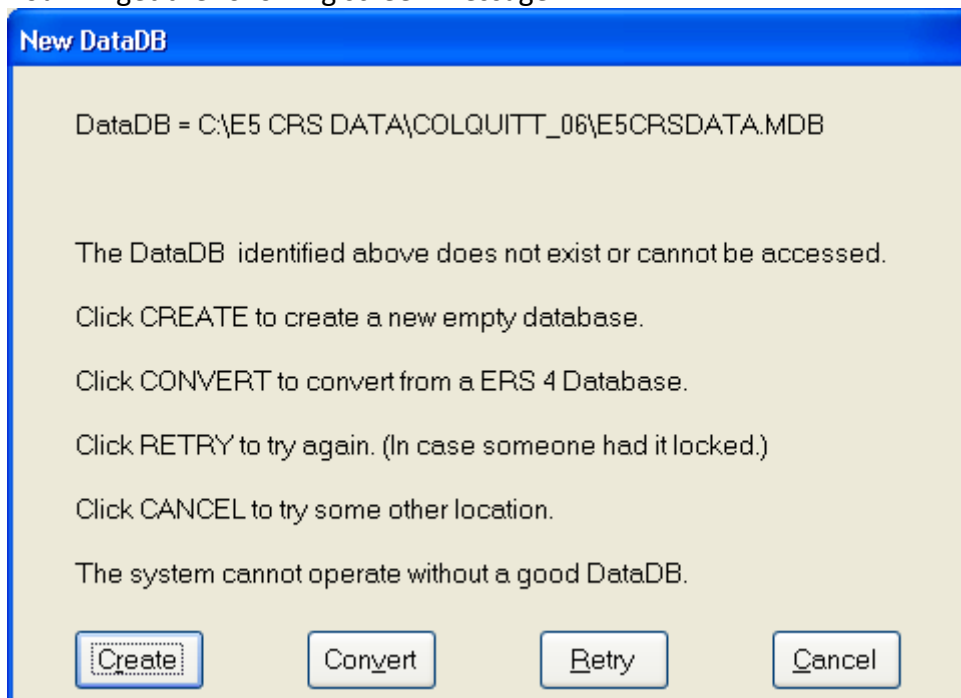


- Click **SAVE**

- Now highlight the DB that you just created and click **ATTACH** at the bottom of the screen

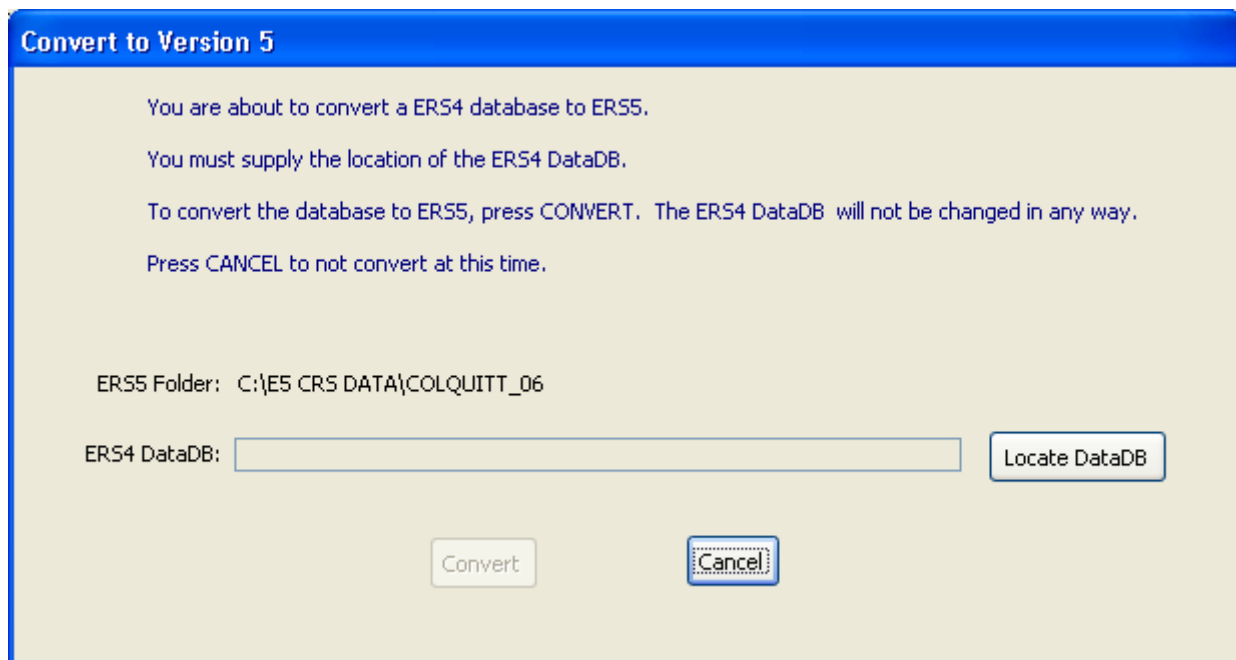


- You will get the following screen message:

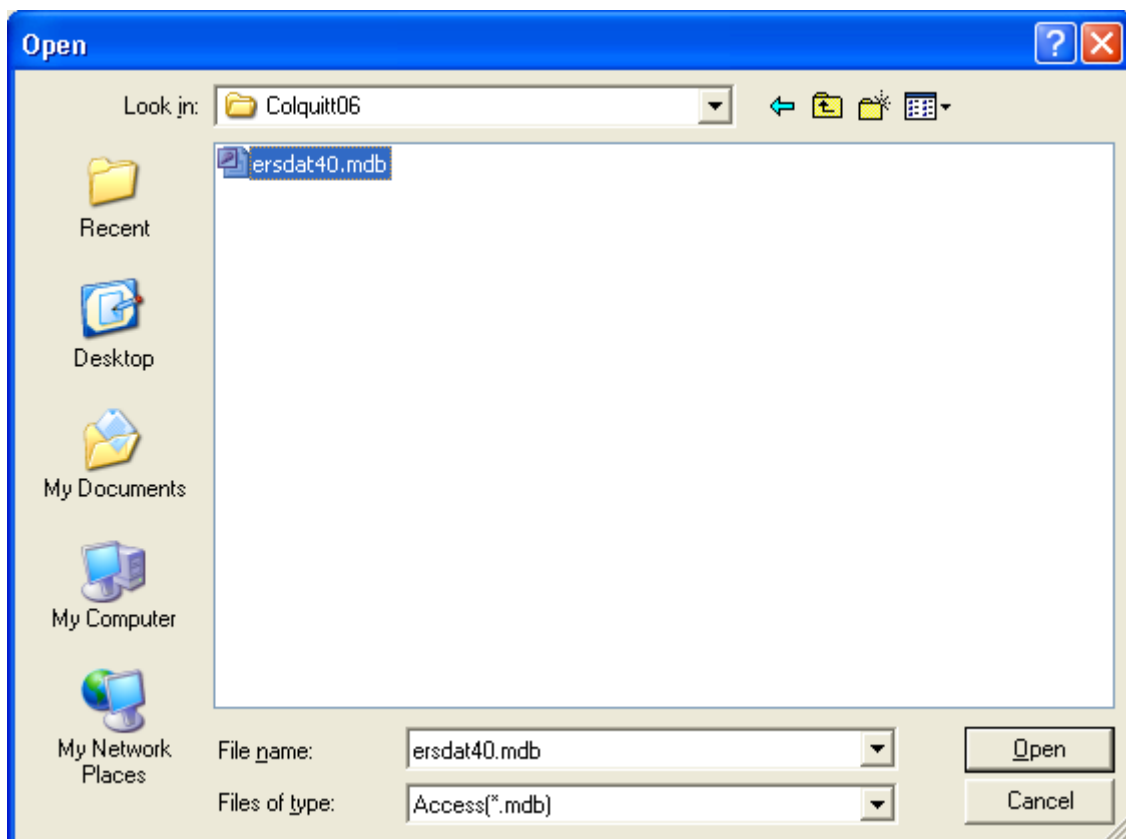


- Click **CONVERT**

- Now click **“Locate DataDB”** to search for the location where your ERS4 files were located

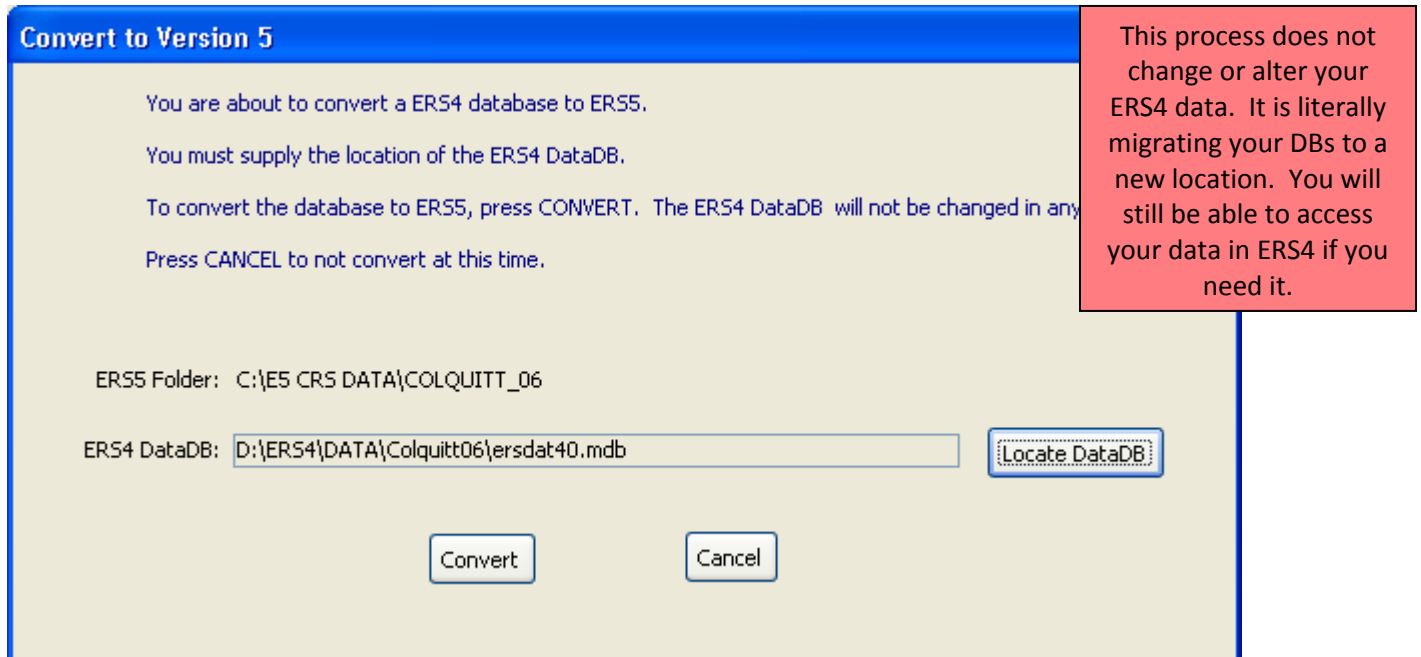


- You are looking for the folder that contains your data. The file you need is **ersdat40.mdb**
- I want to convert Colquitt 06 so I am going to find the file in ERS4 that was the Colquitt 06 data.



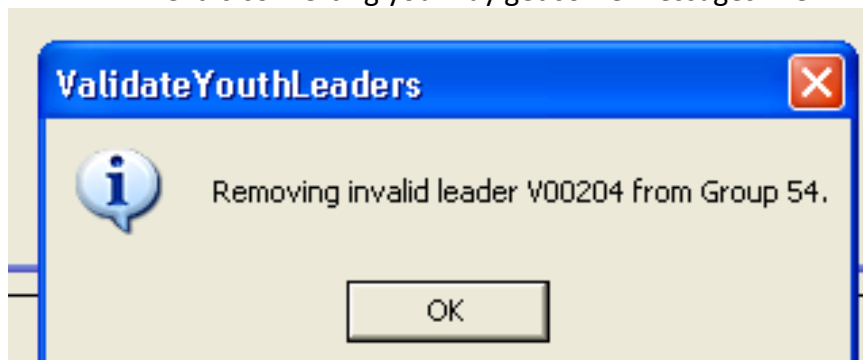
- When you have located the file highlight it and click **OPEN**

- It is very important to make sure that the correct file path shows up on this screen.



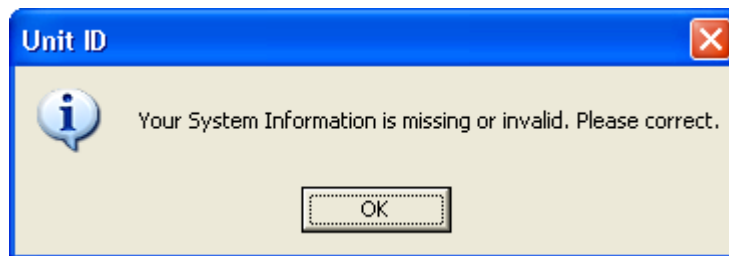
- After you have verified that the ERS4 Data DB is the correct file click **CONVERT**

- While it is converting you may get some messages like:



- This is due to a flaw in ERS4 that allowed deletion of a paraprofessional or volunteer who was the leader of a group. CRS5 cannot have a youth leader who is not in the staff (professional, paraprofessional, volunteer) table. If it encounters a non-existent leader, it is removed from the list of leaders for that group. If you have leaders that are removed during this process they will need to be re-entered in CRS5 once this process is complete.
- Click **OK** and let it continue the process

- When the process is finished it will take you back to the “Main Switchboard.”
- You should receive an error telling you that your System Information is missing.
 - Click **OK**



- You are missing the Institution name. Highlight your institution from the drop down menu.

 A "System Configuration" window with a blue header and a red close button. It contains several fields and instructions:

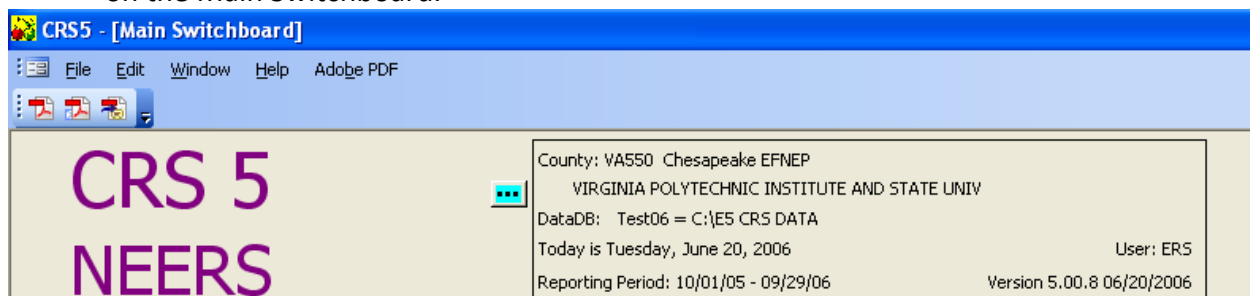
- System Level: **County**
- State: **VA** (dropdown)
- Unit ID: **550**
- Sub Unit: (empty field)
- System Use: **EFNEP** (selected in a dropdown menu, with "NON-EFNEP" also visible)
- Institution: **VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIV** (selected in a dropdown menu)
- Unit Name: **Chesapeake EFNEP**
- Period Begin: **01-Oct-2005** (calendar icon)
- Period End: **29-Sep-2006** (calendar icon)
- Poverty Level Table: **48 Contiguous States and DC** (selected in a dropdown menu, with "Alaska" and "Hawaii" also visible)
- Default Nutrition Method: **Computerized Analysis** (selected in a dropdown menu, with "Food Group Intake" and "External Analysis" also visible)

 Instructions on the right side:

- The Unit ID is your three digit county FIPS code, or other code as may be assigned you by your State. Use the FIPS Code Lookup to find your FIPS code.
- FIPS Code Lookup: <http://www.itl.nist.gov/fipspubs/co-codes/states.htm>
- The Sub Unit is used to distinguish between multiple units in a county.
- If the System Use is EFNEP, you must identify your state's institution. If your institution is not on the list, use one of the three Temporary institutions at the end of the list.
- Use the contiguous-states-and-D.C. guidelines if you are in Puerto Rico, the U.S. Virgin Islands, American Samoa, Guam, the Republic of the Marshall Islands, the Federated States of Micronesia, the Commonwealth of the Northern Mariana Islands, or Palau.

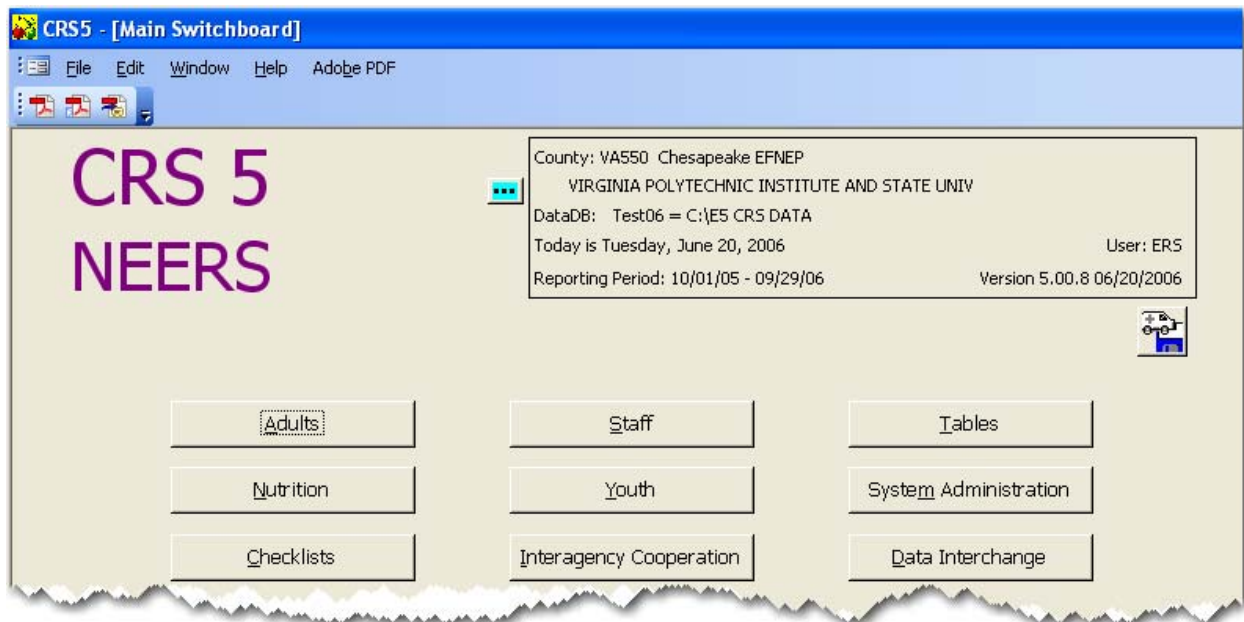
 At the bottom are "Save" and "Cancel" buttons.

- Verify the other information and click **SAVE**.
- You can now verify which DB you are attached to by looking in the top information box on the Main Switchboard.



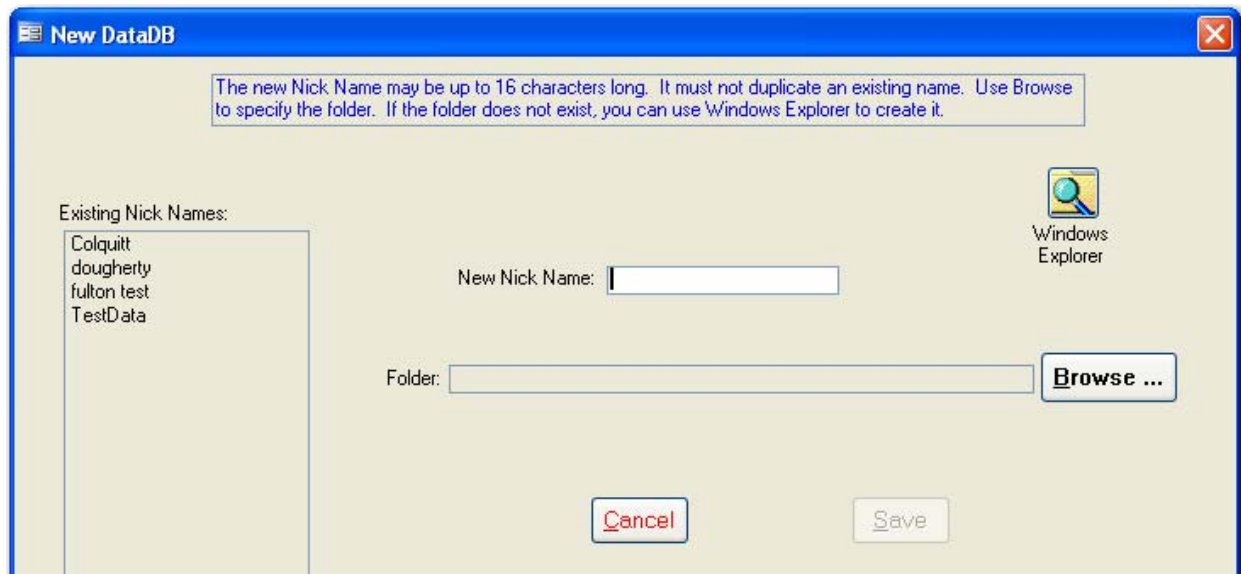
6. Creating a New Database


From the main switchboard click on the **BLUE EXPLODE** button. You are now on the Attach DB screen.

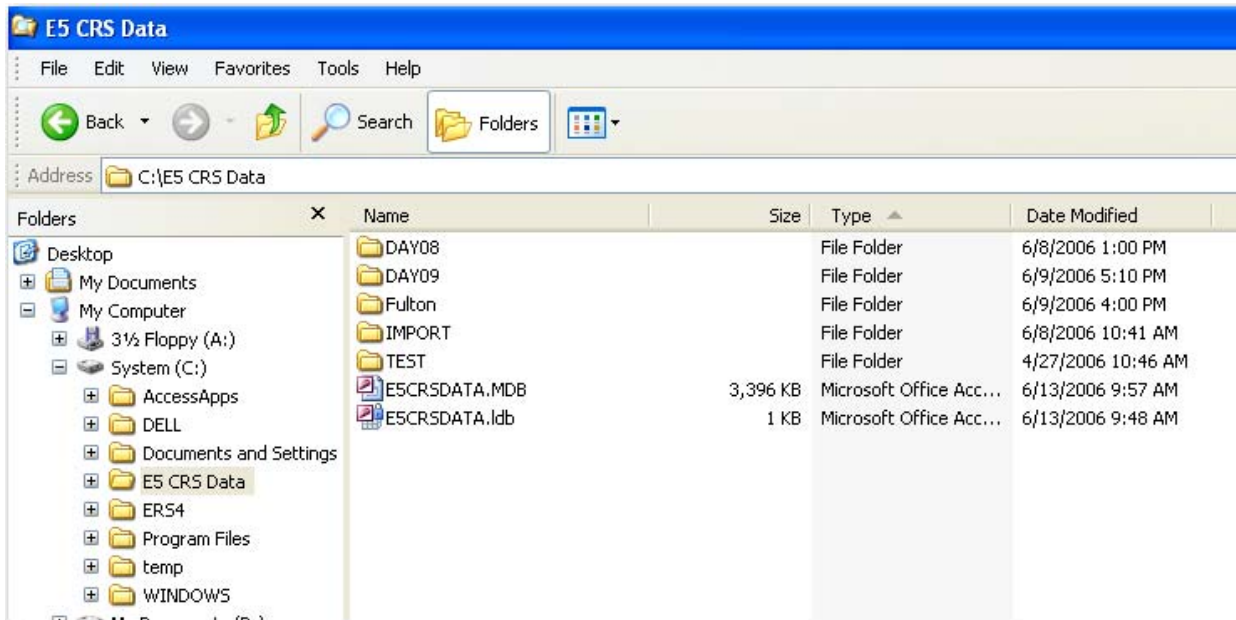


- Click  on the button

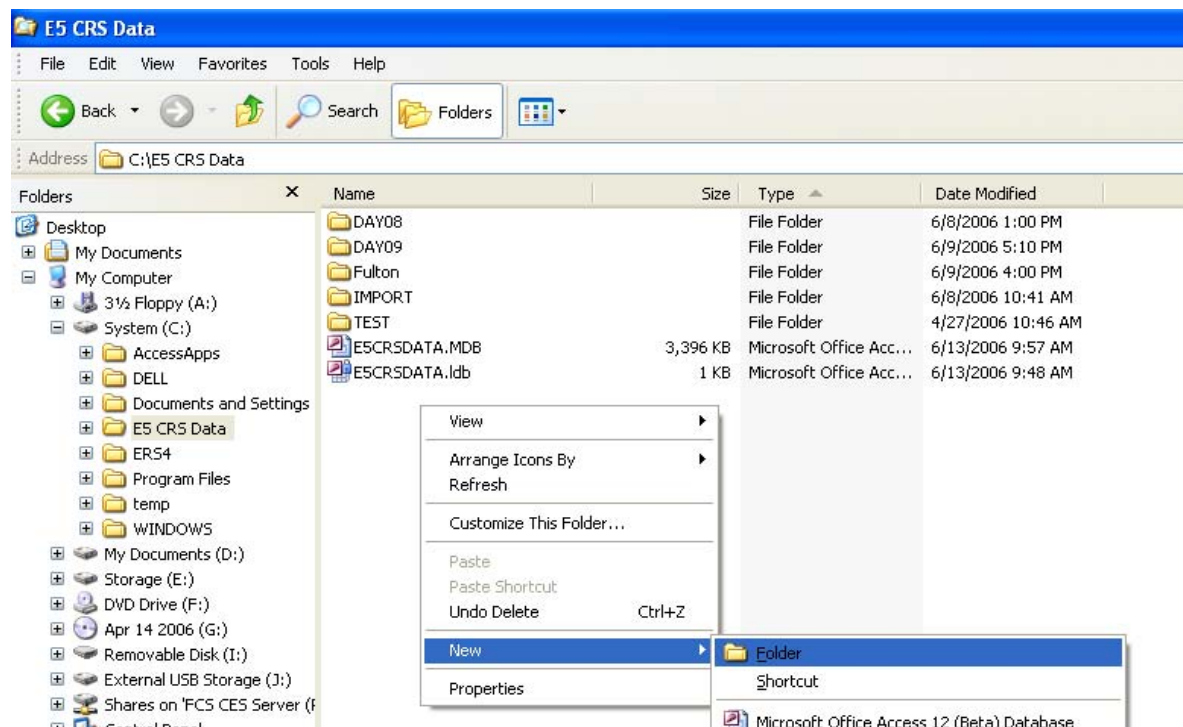
- Create a New Nick Name for this Database.



- Go to  and find the folder C:/E5 CRS Data

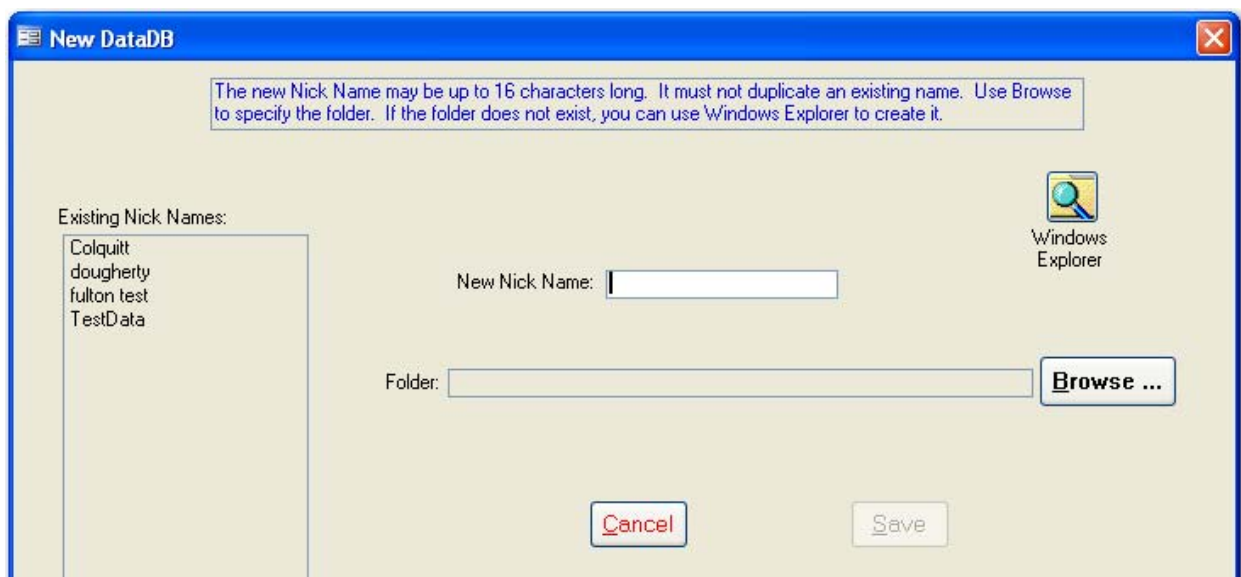


- Right click in the white space and go to New and then click on Folder.
- Name your folder with the appropriate unit name and year. This will help you keep your folder organized as you change years and create multiple units.

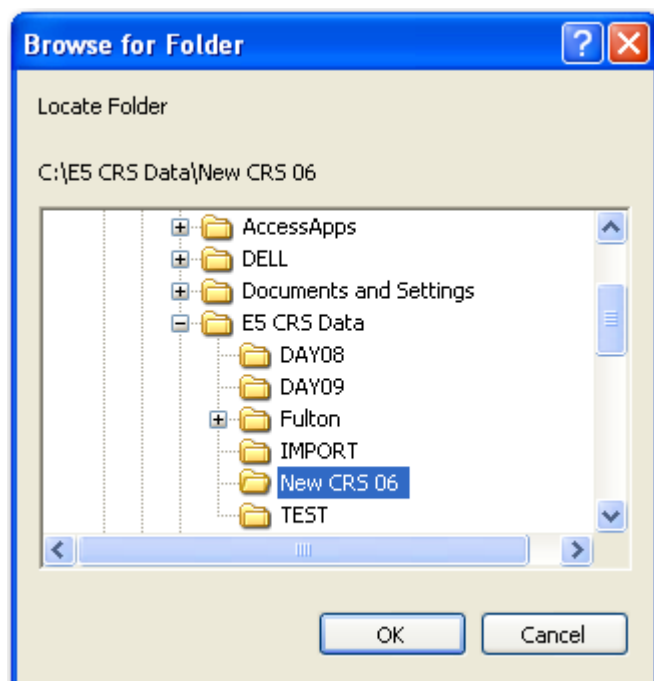


- Close this Windows Explorer Window when you are finished and return to CRS5.

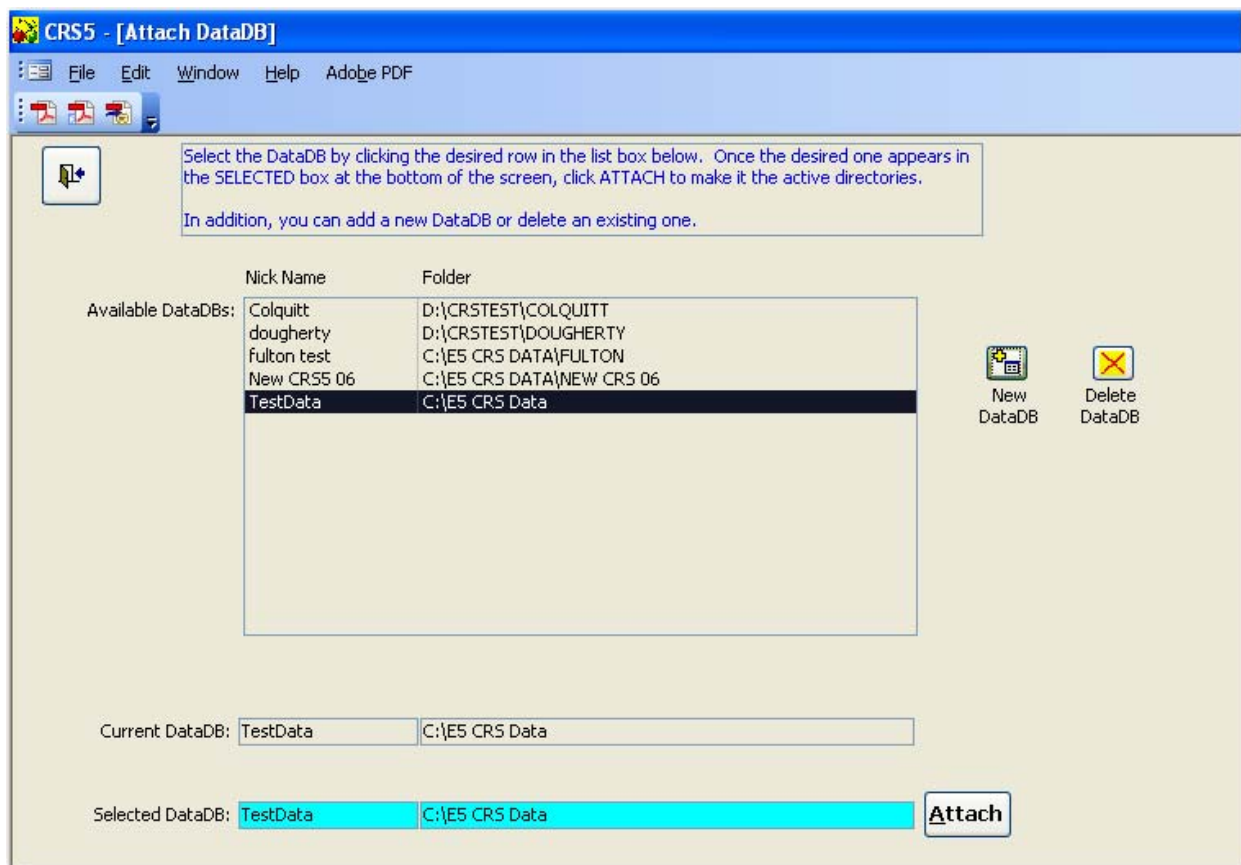
- Click **Browse ...** and locate the folder that was just created.



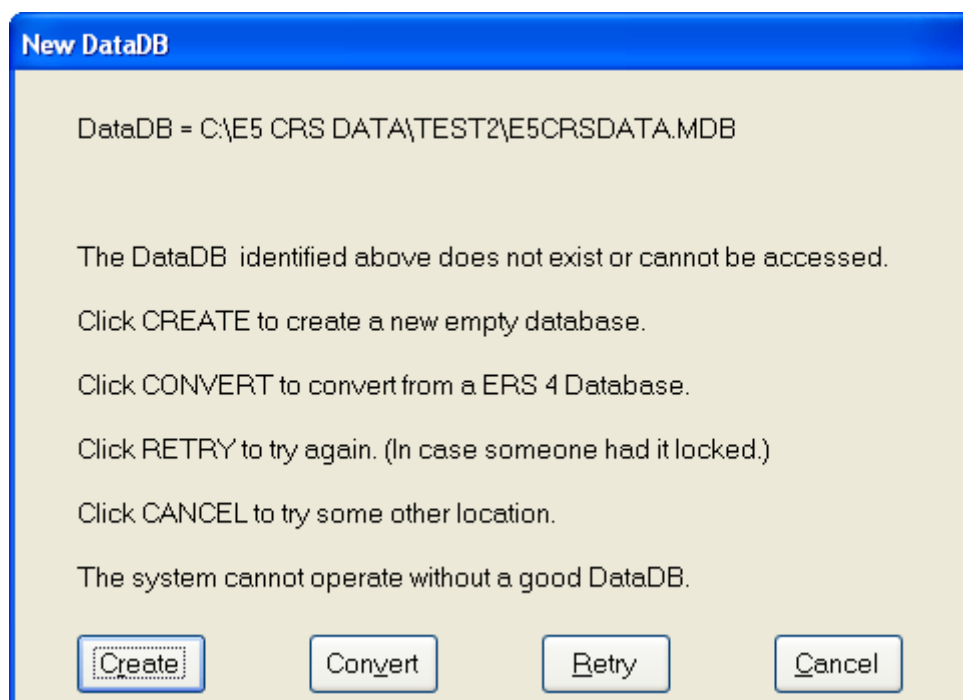
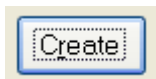
- Find the C:/E5 CRS Data folder and then click on the folder inside that you created for your new Database.
- Click OK
- Click Save



- Click **Attach**



- Click



- The system will now take you to the System Configuration screen.

System Configuration

System Level: **County**

State: **VA**

Unit ID: **550**

Sub Unit:

System Use: **EFNEP**
NON-EFNEP

Institution: **VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIV**

Unit Name: **Chesapeake EFNEP**

Period Begin: **01-Oct-2005**

Period End: **29-Sep-2006**

Poverty Level Table: **48 Contiguous States and DC**
Alaska
Hawaii

Default Nutrition Method: **Computerized Analysis**
Food Group Intake
External Analysis

The Unit ID is your three digit county FIPS code, or other code as may be assigned you by your State. Use the FIPS Code Lookup to find your FIPS code.

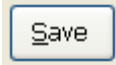
FIPS Code Lookup: <http://www.itl.nist.gov/fipspubs/co-codes/states.htm>

The Sub Unit is used to distinguish between multiple units in a county.

If the System Use is EFNEP, you must identify your state's institution. If your institution is not on the list, use one of the three Temporary institutions at the end of the list.

Use the contiguous-states-and-D.C. guidelines if you are in Puerto Rico, the U.S. Virgin Islands, American Samoa, Guam, the Republic of the Marshall Islands, the Federated States of Micronesia, the Commonwealth of the Northern Mariana Islands, or Palau.

Save **Cancel**

- Enter all of the necessary information here and verify that it is correct.
- Click 
- The system will now take you to the Main Switchboard.

7. The Staff Switchboard

7.1. Accessing Professionals, Paraprofessionals, & Volunteers

- From the “Main Switchboard” click on the STAFF button.
- Enter all personnel who are working with your nutrition program.

Staff members that were previously entered in ERS4 will migrate into CRS5 when your database (DB) is converted.

The screenshot shows a software window titled "[Staff Switchboard]". The window has a menu bar with "Edit", "Window", "Help", and "Adobe PDF". The main area is divided into three columns: "Professionals", "Paraprofessionals", and "Volunteers". Each column contains a vertical stack of buttons: "View/Edit", "Profile Summary", "List by ID", and "List by Name". The "Volunteers" column also includes a "Volunteer List" button. At the bottom of the window, there are two buttons: "Enter Hours" and "Mailing Labels".

Professionals	Paraprofessionals	Volunteers
View/Edit	View/Edit	View/Edit
Profile Summary	Profile Summary	Profile Summary
List by ID	List by ID	Volunteer List
List by Name	List by Name	

Enter Hours Mailing Labels

7.2. Entering Staff

- From the Staff Switchboard (as seen above):
 - Click **“View/Edit”**
 - Click **Add**
 - Click **Next**
 - Complete required fields and other data as needed in your state (screen for professional below)
 - Click **Save** at the bottom of the screen

CRS5 - [New Professional]

File Edit Window Help Adobe PDF

ID: A00001 **Required fields have yellow background.** 13-Jun-2006

First-Last Name:

Address:

City-State-Zip: VA

Phone: Ext:

Gender: Female

Ethnicity:

Race:

Program	Adults	Youth
EFNEP	0	0
FSNE	0	0
State Project	0	0
Other	0	0
Total	0	0
Adult + Youth	0	

7.3. Entering Hours

- On the Staff Switchboard there is an “Enter Hours” Button at the bottom. Click this button to enter hours for all staff members.
- Click on the **BLUE explode** button to enter hours for each individual.

ID	Name	City	Adult Hrs	Youth Hrs	Total Hrs
P00001	BUFKA, IRIS	CHESAPEAKE VA	2080	0	2080
P00004	MITCHELL, DORIA	PORTSMOUTH VA	1040	1040	2080
P00005	JONES, WILHELMENI	NORFOLK VA	1040	1040	2080
V00014	AMES, GLENDA	CHESAPEAKE VA	0	10	10
V00086	McDERMOTTE, SUSAN	CHESAPEAKE VA	0	12	12
V00177	JONES, DEE	CHESAPEAKE VA	193	0	193
V00357	BLAKE, CONNIE	CHESAPEAKE VA	0	20	20
V00379	SWAIN, VALARIE	CHESAPEAKE VA	0	6	6
V00457	BERRY, CAROLYN	CHESAPEAKE VA	6	12	18
V00467	LAMB, MONICA	CHESAPEAKE VA	8	0	8
V00474	ADAMS, JENNIVER	CHESAPEAKE VA	6	0	6
V00512	BURKHALTER, KAREN	CHESAPEAKE VA	4	6	10
V00533	WILLIAMS, SABRINA	CHESAPEAKE VA	4	6	10
V00564	BROWN, JANET	CHESAPEAKE VA	0	6	6
V00565	DISHROOM, MARY	CHESAPEAKE VA	0	6	6
V00566	DOSS, DALE	CHESAPEAKE VA	0	6	6
V00571	O'NEAL, FLOYD	CHESAPEAKE VA	0	10	10
V00574	GILBERT, MARCI	CHESAPEAKE VA	2	10	12
V00575	HUGHES, ADRIAN	CHESAPEAKE VA	0	10	10
V00581	HUGHES, WANDA	CHESAPEAKE VA	0	6	6
V00602	DOWN, CYNTHIA	CHESAPEAKE VA	3	6	9
V00621	SAWYER, SHARON	CHESAPEAKE VA			

TIP: Note that you can select by Staff Type at the top so that you are only viewing one group of staff at a time.

- At the end of the reporting year, enter hours spent with Adults and Youth in each program.
 - SAVE**
 - Back out to the Main Switchboard

A warning will appear if the total FTE hours are over the FTE hours for the fiscal year (2080)

Warning: One FTE is 2080 hours. Total hours exceeds 2080.

Program	Adults	Youth
EFNEP	2080	0
FSNEP	0	0
State Project	0	0
Other	0	0
Total	2080	0
Adult + Youth	2080	

TIP: TAB between fields and the computer will add the totals.

New Feature in CRS5

☐ Auto Advance to Next Individual After Save

Save

Cancel

7.4. The Volunteer Screen

- Volunteers are entered under the Staff Switchboard on the Main Switchboard.
- Click **STAFF**
 - **VOLUNTEERS**
 - **VIEW/EDIT VOLUNTEER**

Volunteers that were entered in ERS4 can be found here

- If you wish to add new volunteers click **ADD VOLUNTEER**
- Make sure that you assign the correct Paraprofessional or Professional to the Volunteer
- Check the appropriate box for their volunteer role in EFNEP
- The “SAVE” button will not appear until all required fields are completed

CRS5 - [New Volunteer]

File Edit Window Help Adobe PDF

ID: V00736 **Required fields have yellow background.** 13-Jun-2006

First-Last Name:

Address:

City-State-Zip: VA

Phone: Ext:

Gender: Female Age Code: Adult

Ethnicity: Not Hispanic/Latino
Hispanic or Latino
Not Provided

Race: American Indian or Alaskan Native
Asian
Black or African American
Native Hawaiian or Other Pacific Islander
White
Not Provided

Paraprofessional: P00005 JONES, WILHELMENI

Volunteer Roles

Is current/former EFNEP Participant: ☐

Performs Instructional Role: ☐

Performs Advisory Committee Role: ☐

Performs Educational Support Role: ☐

Performs Support Service Role: ☐

Performs as Middle Manager: ☐




Program	Adults	Youth
EFNEP	0	0
FSNE	0	0
State Project	0	0
Other	0	0
Total	0	0
Adult + Youth	0	0

Save Cancel

TIP: TAB
between fields
and the computer
will add the
totals.
The tabs go down
the column and
then across

8. The Adult Switchboard

8.1. Entering Data for Adults



































































- From the “Main Switchboard” screen, click on Adults.
- This is where you will begin entering data for new or existing clients
- To add an adult click **ADD ADULT** button at the top right.
- The list of existing clients can be sorted by ID, Name, City, Staff, or Program Status. Clicking on one of these options will sort this list in ascending order. Clicking again will re-sort the data in descending order.
- This screen also provides the user with specific information about each client, including which staff member they are assigned to, as well as information concerning their program status.
- To edit information on an Adult from this screen click on the **BLUE explode** button  and you will go straight to their record.
- To edit diet recalls or behavior checklists on an adult click on the **PURPLE explode** button .
- The **Yellow X**  will delete a client.

CRS5 - [View/Edit Adults]

File Edit Window Help Adobe PDF

Locate Adult ID: Staff Filter: <ALL> Add Adult

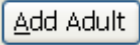
Adult Filter: <ALL>

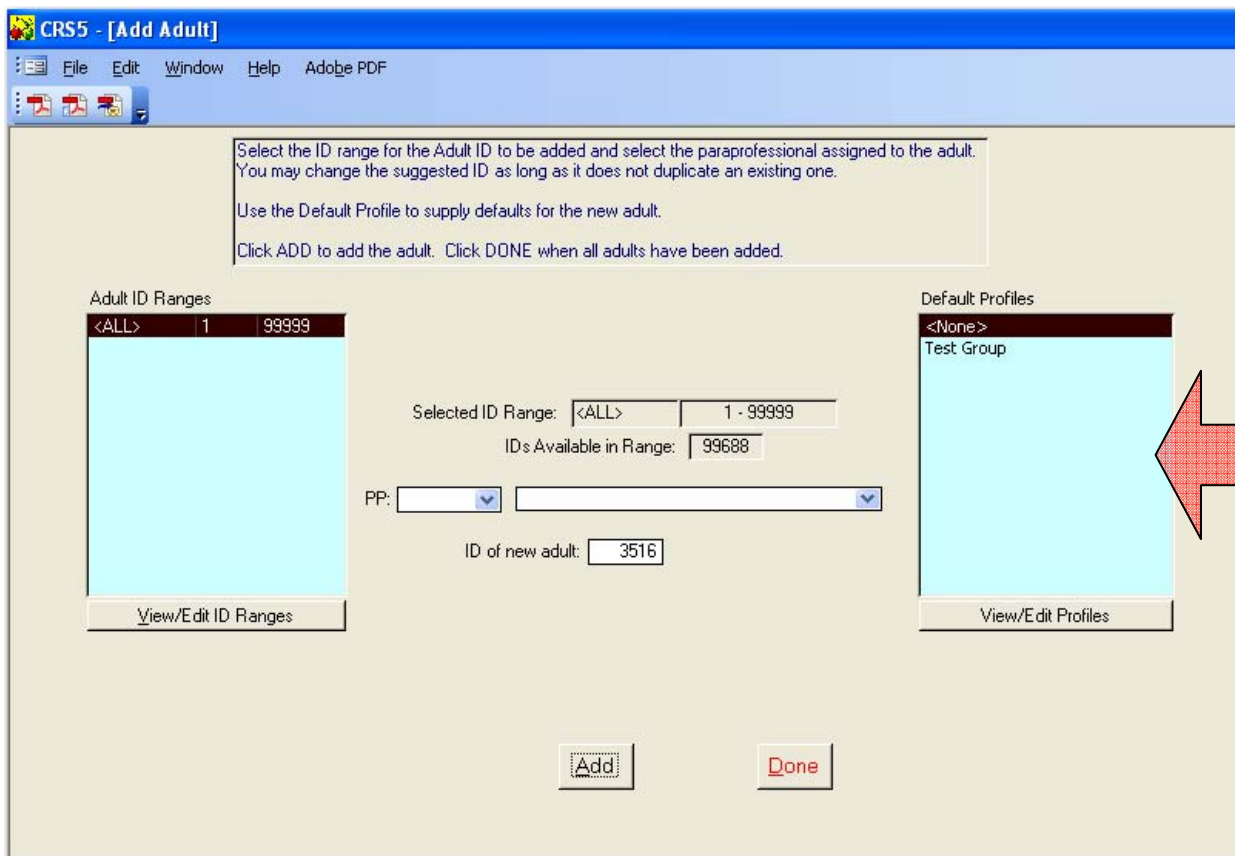
ID	Name	City	Staff	Program Status			
2620	THOMAS, LaTONYA	CHESAPEAKE VA	DORIA MITCHELL	Ed. objectives met			
2625	SMITH, MICHELLE B	CHESAPEAKE VA	DORIA MITCHELL	Ed. objectives met			
2682	LENA, MICHELE	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met			
2686	ROOK, REBECCA	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met			
2709	ROBERTSON, SHARAL	CHESAPEAKE VA	DORIA MITCHELL	Ed. objectives met			
2720	DANIELS, JESSICA	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met			
2722	ROMAN, JANNETTE	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met			
2782	GATLIN, LaTASHA	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met			
2840	BYRANT, PAULINE	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met			
2845	VIDALLON, REBECCA	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met			
2871	DAVIS, LYNN	CHESAPEAKE VA	WILHELMENI JONES	Ed. objectives met			
2904	ROBINETTE, AMITY	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met			
2918	WHITE, LeQUISHA	SUFFOLK VA	IRIS BUFKA	Ed. objectives met			
2927	GAUTHIER, BARBARA	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met			
2961	WILLIAMS, LaTOYIA	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met			
2981	HILTON, LINDSEY	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met			
3005	EDWARDS, STEPHANIE	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met			
3040	ROBBINS, SONYA	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met			
3123	LARSON, KIM	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met			
3145	PRESCOTT, CARMEN	CHESAPEAKE VA	DORIA MITCHELL	Ed. objectives met			
3166	JEFFERSON, SHIRLEY	CHESAPEAKE VA	DORIA MITCHELL	Ed. objectives met			
3168	HORST, KYLE	CHESAPEAKE VA	IRIS BUFKA	Ed. objectives met			

Adults can be filtered by staff and program type.

New CRS5 feature: Sorting Lists, Staff Assignment, Program Status

8.2. Adding NEW Adults

- Click 
- You will then be prompted to assign this adult to the staff person who is working with him/her. Choose the appropriate staff member from drop down menu. (If a staff member is not listed, back out and go to the Staff Switchboard to enter the staff member.)
- Click “Add”



CRS5 - [Add Adult]

File Edit Window Help Adobe PDF

Select the ID range for the Adult ID to be added and select the paraprofessional assigned to the adult. You may change the suggested ID as long as it does not duplicate an existing one.

Use the Default Profile to supply defaults for the new adult.

Click ADD to add the adult. Click DONE when all adults have been added.

Adult ID Ranges

Range	Start	End
<ALL>	1	99999

View/Edit ID Ranges

Selected ID Range: <ALL> 1 - 99999

IDs Available in Range: 99688

PP: [dropdown]

ID of new adult: 3516

Default Profiles

Profile	Description
<None>	Test Group

View/Edit Profiles

Add Done

New CRS5 feature – Creating Default profiles for entering adults See Section 8.4.3

- You will be taken to a screen that says “New Adult” which should look similar to the page below.

CRS5 - [New Adult]

File Edit Window Help Adobe PDF

ID: 3516 PP: P00005 JONES, WILHELMENI 20-Jun-2006

First-Last Name: Address: City-State-ZIP: County: FIPS Code: Cong. District: MSA: Lat-Long: Phone: Ext: Age: 0 Age not given. Gender: Female is Pregnant is Nursing Residence: Highest Grade: Not Supplied Household income: N/S per month (N/S=not supplied) Lesson Type: Unknown Number of Lessons: 0 Number of Contacts: 0 Children: Ages 0-5: 0 Ages 6-13: 0 Ages 14-19: 0 Others in Household: 0 Household Total: 1 Remarks:

Address not verified.

Public Assistance at Entry
F:Child Nutrition
F:FDPIR
F:Food Stamps
F:Head Start
F:Other
F:TANF
F:TEFAP - Commodity
F:WIC/CSFP

Race: American Indian or Alaskan Native
Asian
Black or African American
Native Hawaiian or Other Pacific Islander
White
Not Provided
Race/Ethnic Subcategory (Optional)
[None]

Program Status: Active
Entry Date: 01-Jan-2005

Entry Recall:
Exit Recall:
Entry Checklist:
Exit Checklist:

At least one Federal subgroup is required

Subgroups
F:EFNEP
F:ESWIC
F:FSNE
F:Sample
F:TeamNutrition

Save Cancel

TIPS

1. Hitting the TAB key after finishing in each field will take you to the next field.

2. Fields that appear in YELLOW are required fields. You will not be able to save this record until all of the yellow fields are entered.

- Now you can enter all the demographic information you have on the client into the appropriate fields.

- CLICK  when you have finished entering all of this data.

The following screen is a sample record of adult information that has already been entered.

CRS5 - [Edit Adult]

File Edit Window Help Adobe PDF

ID: 2722 PP: P00001 BUFKA, IRIS 1999

First-Last Name: JANNETTE ROMAN Address: 701 MEADOWLARK STREET City-State-ZIP: CHESAPEAKE VA 23322 County: FIPS Code: Cong. District: MSA: Lat-Long: Phone: (757) 421-4721 Ext: Age: 25 Gender: Female is Pregnant is Nursing Residence: Suburbs of cities over 50,000 Highest Grade: Not Supplied Household income: 1599 per month (N/S=not supplied) Lesson Type: Individual Number of Lessons: 11 Number of Contacts: 11 Children: Ages 0-5: 2 Ages 6-13: 0 Ages 14-19: 0 Others in Household: 1 Household Total: 4 Remarks: ER54 RaceCode=1-00 (757) 421-4721

Address not verified. Verify Address

Ethnicity: Not Hispanic/Latino Race: American Indian or Alaskan Native Asian Black or African American Native Hawaiian or Other Pacific Islander White Not Provided Race/Ethnic Subcategory (Optional) [None]

Program Status: Ed. objectives met Entry Date: 22-Jun-1999 Exit Date: 13-Jun-2000 Entry Recall: 06/22/99 Exit Recall: 06/13/00 Entry Checklist: 06/22/99 Exit Checklist: 06/13/00

Subgroups
F:EFNEP
F:ESWIC
F:FSNE
F:Sample
F:TeamNutrition

Public Assistance at Exit (Due to staff help)
F:Food Stamps
F:Head Start
F:Other
F:TANF
F:TEFAP - Commodity
F:WIC/CSFP

Save Cancel Save and Print Adult Record

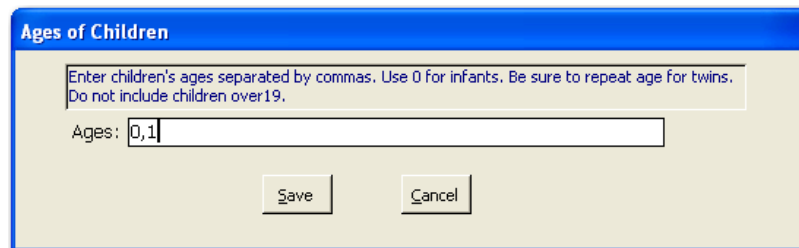
New CRS5 feature - Verifying the address is optional. See section 8.4.1.

8.3. IMPORTANT INFORMATION FOR ENTERING CLIENT DATA.

- Under the SUBGROUP category, select the appropriate SUBGROUP for each client.

EFNEP clients must have the "A" EFNEP Subgroup selected.

- The "Number of Children" category must be completed. The "Ages of Children" should be entered, separated by commas. Use zero for infants. Make sure to repeat age for twins, as each age listed represents one child. Do not include children over the age of 19.



Ages of Children

Enter children's ages separated by commas. Use 0 for infants. Be sure to repeat age for twins. Do not include children over 19.

Ages: 0,1

Save Cancel

- One last thing to check as a client graduates is the number of lessons. Please enter the **NUMBER OF LESSONS TAUGHT** upon exit or graduation. If this is not completed, it will indicate that clients were not taught any lessons before graduating.
- Remember that any fields that are yellow are required and you must enter data there in order to have the ability to save.
- CLICK SAVE when you have finished entering all of this data.

8.4. New CRS5 Features on the Adult Screen

8.4.1. VERIFY ADDRESS

**When you enter a city, state, and zip code you have the option to VERIFY ADDRESS.
To verify addresses you must be connected to the internet.**

- Clicking “Verify Address” allows CRS5 to give you the Congressional district of the address, the county, and the latitude/longitude coordinates of the location.
- This is information that will allow you to pull data specific to Congressional districts or by zip code.
- Verifying the address also ensures accuracy that will help later when trying to follow up with a client.
- Verifying the address is OPTIONAL and if you choose not to verify addresses, it will not prevent you from saving the records and moving on with your data.
- If only the city, state, and zip code are listed, “General Delivery” will appear in the address line.

Before Verification

The screenshot shows the 'CRS5 - [Edit Adult]' form. The 'Address' field contains '701 MEADOWLARK STREET'. The 'City-State-ZIP' field contains 'CHESAPEAKE VA 23322-'. The 'Verify Address' button is visible. The 'Address not verified.' status is displayed in blue text.

After Verification

The screenshot shows the 'CRS5 - [Edit Adult]' form after verification. The 'Address' field now contains '701 Meadowlark St'. The 'City-State-ZIP' field contains 'Chesapeake VA 23322-4114'. The 'Unlock Address' button is visible. The 'Address was verified on 20-Jun-2006.' status is displayed in blue text. An arrow points to the 'Unlock Address' button.

To change an address after it has been verified, click on “Unlock Address”

8.4.2. NUMBER OF CONTACTS

The Adult screen also asks that you enter # of Contacts.

- When clients are converted from ERS4 to CRS5 the Number of Contacts are set to equal the number of lessons.
- The Number of Contacts box is to reflect the # of times you have contact with a client. For instance you may have met with a client or group 5 times, but taught 10 lessons because 2 lessons were taught per visit. Contacts would be 5, number of lessons would be 10.

The screenshot shows the 'Number of Contacts' section of the form. It includes fields for 'Highest Grade' (Not Supplied), 'Household income' (1599 per month), 'Lesson Type' (Individual), 'Number of Lessons' (11), and 'Number of Contacts' (11). There are also checkboxes for 'Children' and 'Subgroup'.

8.4.3 DEFAULT PROFILES

Default profiles can be utilized for large groups that will have similar information such as city, state, zip, residence type, lesson type, and/or subgroup.

You can choose to enter only some of the information in the profile while leaving other parts blank. (Example – city and state with no zip code where zip codes vary) For Example, if you have a large number of EFNEP clients in Athens, Georgia which has multiple zip codes you may want to enter a profile for Athens, Georgia but leave the zip code blank. You could also choose to enter the Subgroup “EFNEP” for this profile. You might name it Athens EFNEP.

- Default profiles are meant to save time entering data that may be identical on individual records
- Once a Default Profile is created it is available to any user of that database.
 - From the Add Adult screen there is now an option for creating “Default Profiles”
 - Click on “View/Edit Profiles”
 - You will go to a screen that looks like:

- Click Add Profile on the left
- Enter the Name for the profile you are creating. (32 characters max)
- You can choose to enter info in any or all of the following fields
 - city, state, zip, residence type and lesson type, and/or subgroup
- The Default Profiles section can also be accessed from the **Adult Switchboard** by clicking on the “**Defaults for New Adults**” button

Each time you enter an adult, the list of default profiles will appear and you can select the one profile you wish to use. The list appears alphabetically.

8.5. SUBGROUPS

8.5.1 Creating and Importing State Level Subgroups

The first and most important step in creating a state level subgroup is creating a spreadsheet in Microsoft Excel that can be imported into CRS5.

Your spreadsheet should have three columns and as many rows as needed for your state level subgroups.

Example:


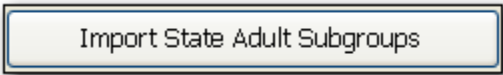
State	SubgroupName	SubgroupDescription
GA	MomsHelper	Mom's Helper
GA	BasicEFNEP	Basic EFNEP
GA	FoodSmart	Food \$mart
GA	Today'sMom	Today's Mom
GA	4HDOT	4H DOT
GA	TestGroup	Test
GA	Teen+Pregn/Breastfeeding	Teen+Pregn/Breastfeeding
GA	ClientsAged65+	Clients Aged 65+
GA	GardeningProject	Gardening Project
GA	ClientW/ChronicDisease	Client W/Chronic Disease
	Spreadsheet must be formatted as above with the first row providing the column names.	
	State: Two letter state abbreviation.	
	SubgroupName: Name of Subgroup (max of 24 characters)	
	SubgroupDescription: Brief description of subgroup (max 50 characters)	


TIP: The Subgroup Spreadsheet file **MUST** be named **StateSubgroup.xls** in order for CRS5 to recognize the file and import it properly.

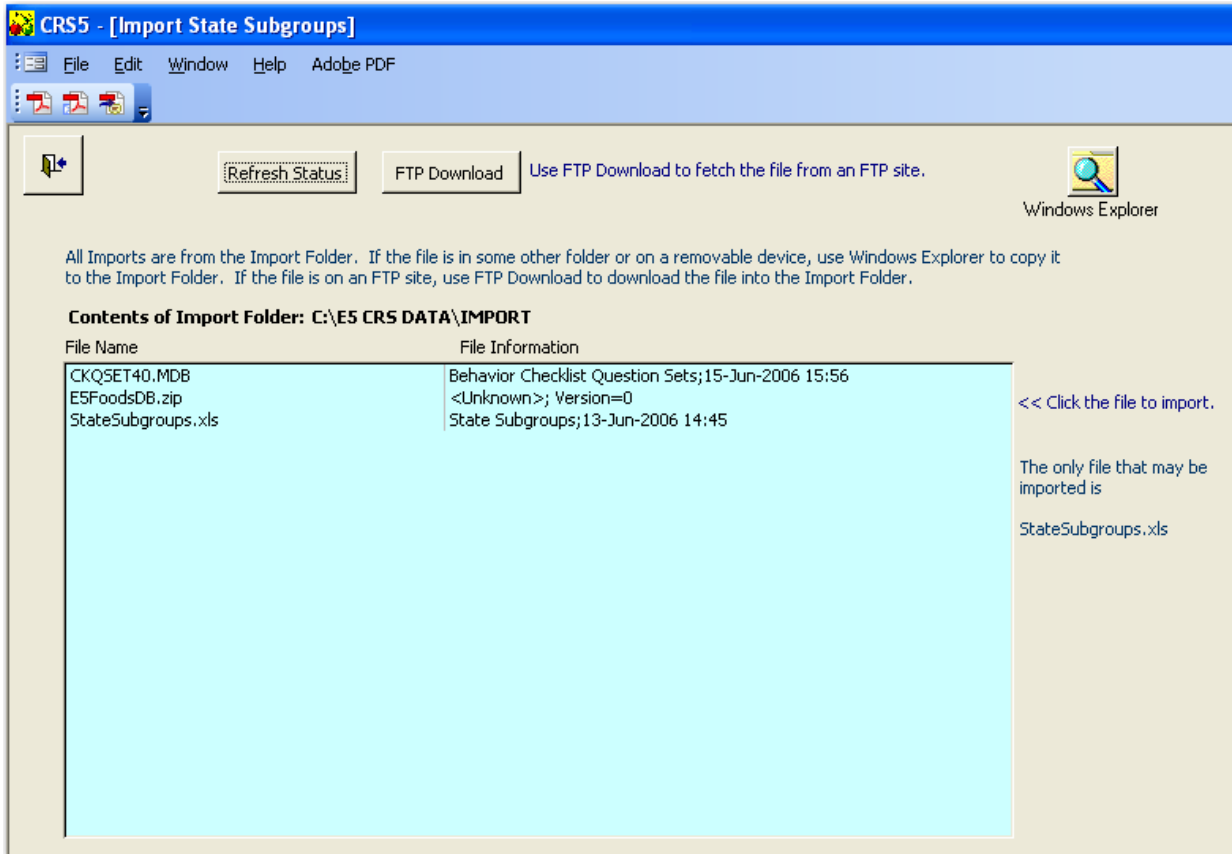
The headers must be named exactly as they appear above.

The state abbreviation should always be the two letter abbreviation that corresponds to the state abbreviation you are using in CRS5 (see system configuration screen).

There are three options for deploying these subgroups to the county level.

1. Upload this **StateSubgroups.xls** file to your FTP site that county users may access within CRS5 with a username and password that you have provided them. This option will automatically place this file in the correct location.
2. This file can be e-mailed to the counties and then they must save it on their hard drive in the appropriate folder.
 - a. Log into CRS5 and attach the DB that you want to import the State Subgroups for.
 - b. Click 
 - c. Click 
 - d. This step simply creates the folder where your imports need to be saved.

- e. Go back to the e-mail with the attached **StateSubgroups.xls** file and save it to the appropriate folder. C:/E5 CRS Data/*UnitName*/IMPORT
 - i. Each unit will have to have its own IMPORT folder.
- f. Go back to CRS5 and click  and you should see the file show up in the blue box.



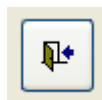
- g. Click on the file name to perform the import

- Click Yes

State	Subgroup Name	Subgroup Assistance
GA	MomsHelper	Mom's Helper
GA	BasicEFNEP	Basic EFNEP
GA	FoodSmart	Food \$mart
GA	TodaysMom	Today's Mom
GA	4HDOT	4H DOT
GA	TestGroup	Test
GA	Teen+Pregn/Breastfeeding	Teen+Pregn/Breastfeeding
GA	ClientsAged65+	Clients Aged 65+
GA	GardeningProject	Gardening Project
GA	ClientW/ChronicDisease	Client W/Chronic Disease

- Click OK

Click the Backdoor



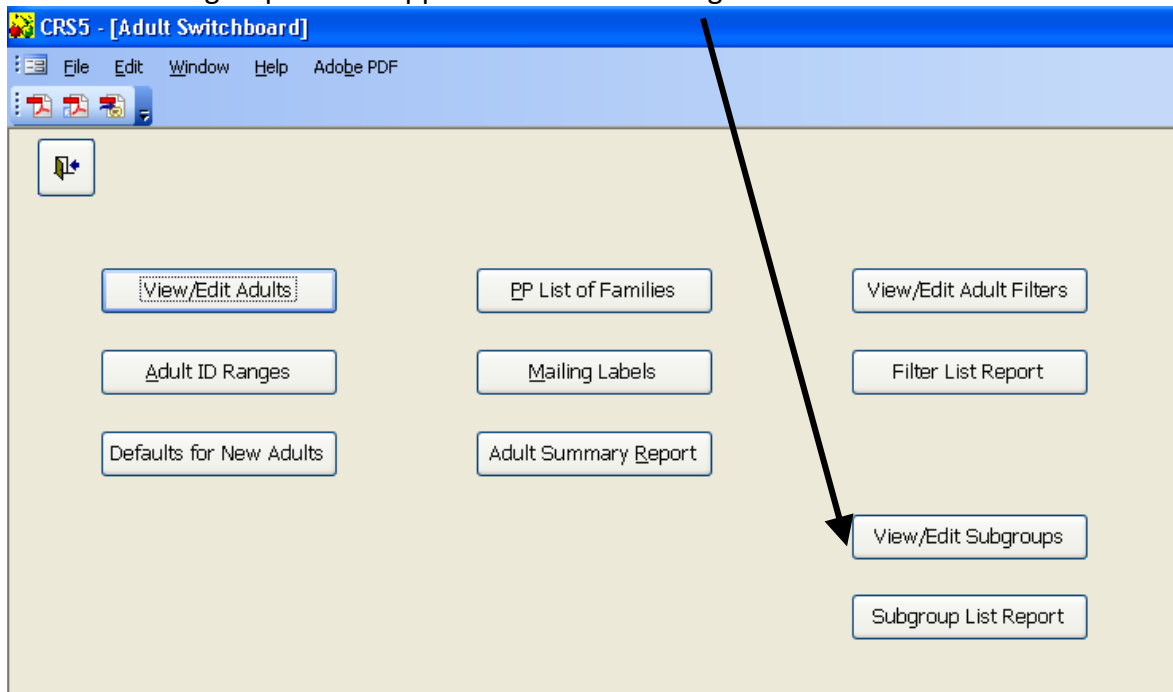
out to the Main Switchboard.

3. If you create your subgroup list and save it to a removable media disk (CD, flash drive, floppy disk) the file must be saved onto the computer's hard drive in the correct folder. You can follow the e-mail directions from #2 above to go through the same process of saving and importing your subgroup list.

8.5.2 County Level Subgroups

The subgroup section is now located under the Adult Switchboard.

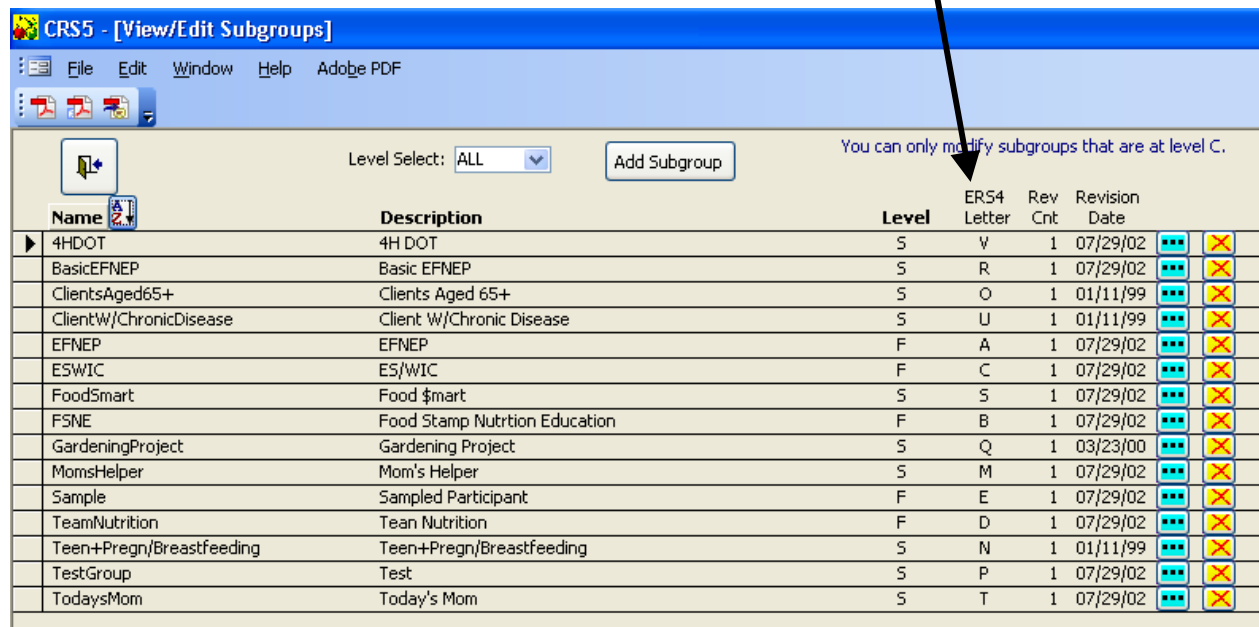
- From the Main Switchboard click on **ADULTS**
- The subgroup section appears at the bottom right.



- Click on **VIEW/EDIT SUBGROUPS**

This screen will list any subgroups that exist from the Federal, State, and County level that have migrated into CRS5 from ERS4.

The previous letters that were assigned to these subgroups in ERS4 also appear here.



- CRS5 users only have the ability to modify subgroups that are created at the County (C) level.
- To create a new subgroup click on **ADD SUBGROUP** at the top of this screen.

Subgroups are no longer limited to letters of the alphabet. The old subgroup codes from ERS4 have been replaced with an unlimited ability to designate groups.

- Some states have public assistance programs separate from or as an extension to Federal programs, and these might be useful to include as part of the screening process for eligibility into EFNEP and for tracking purposes.

CRS5 - [New Subgroup]

File Edit Window Help Adobe PDF

Enter the new subgroup name and click NEXT.

Existing Subgroups

- F:EFNEP
- F:ESWIC
- F:FSNE
- F:Sample
- F:TeamNutrition

New Subgroup's Name:

Max 24 characters, no spaces.

Next >

Done

- Select a name for your new Subgroup and click **NEXT**

Edit Subgroup

03/31/06

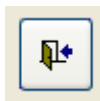
Rev Count: 0

Name: Test

Description: New

Save Cancel

- Enter a description for the new subgroup here and click **SAVE**
- Click Done



- Backdoor out twice to the Main Switchboard

TIP: States will have the ability through SRS5 to add state unique public assistance to the database. States can send their unique subgroups to the counties for inclusion in their CRS5.

The two you see for VA in the test data are present to show how they work. For example, you can include them in adult filters. “VA” is the state abbreviation in this example. This can be changed using system configuration to reflect the appropriate state as needed.

8.6 Importing State Level Public Assistance Codes

While CRS5 is equipped with some standard Public Assistance codes, there may be a need to customize this list from a state level to include a specific state public assistance programs that need to be included in CRS5. The process for creating and importing state level public assistance codes is similar to creating and importing state level subgroups.

Your spreadsheet should have three columns and as many rows as needed for your state level subgroups

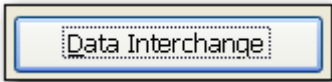
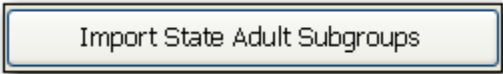
The headers must be named exactly as they appear below.

The state abbreviation should always be the two letter abbreviation that corresponds to the state abbreviation you are using in CRS5 (see system configuration screen).

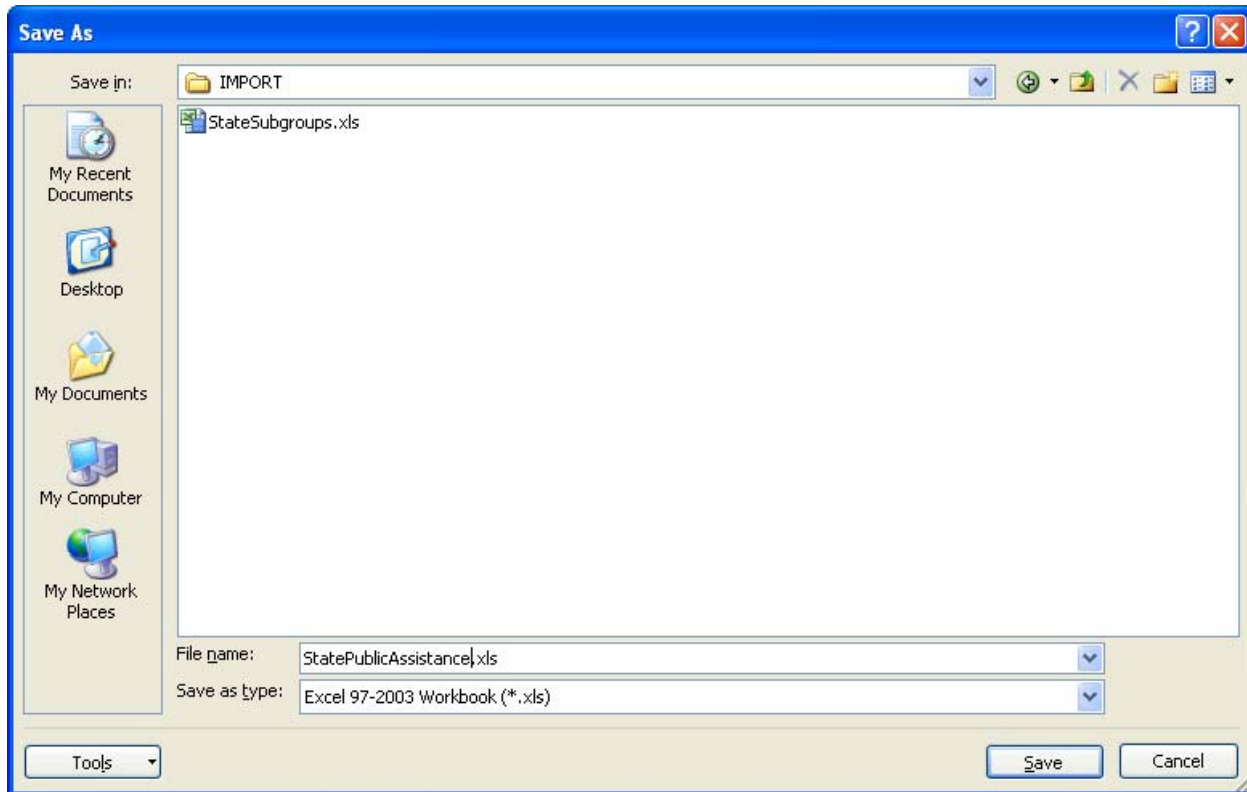
State	ProgramName	FoodAssistance
GA	Emergency Feeding Sites or Soup Kitchens	YES
GA	Senior Dining Sites	YES
GA	Applying for Food Stamps	
GA	Social Security Disability	
GA	Supplemental Security Income	
GA	Food Pantries	YES
GA	Medicaid/Medicare	
GA	Child Health Plus	
	Spreadsheet must be formatted as above with the first row providing the column names.	
	State: Two letter state abbreviation.	
	ProgramName: Name of Public Assistance (max of 47 characters)	
	FoodAssistance: Enter YES if this program provides food assistance. Anything other than YES is assumed to be NO.	


TIP: The Subgroup Spreadsheet file **MUST** be named **StatePublicAssistance.xls** in order for CRS5 to recognize the file and import it properly.

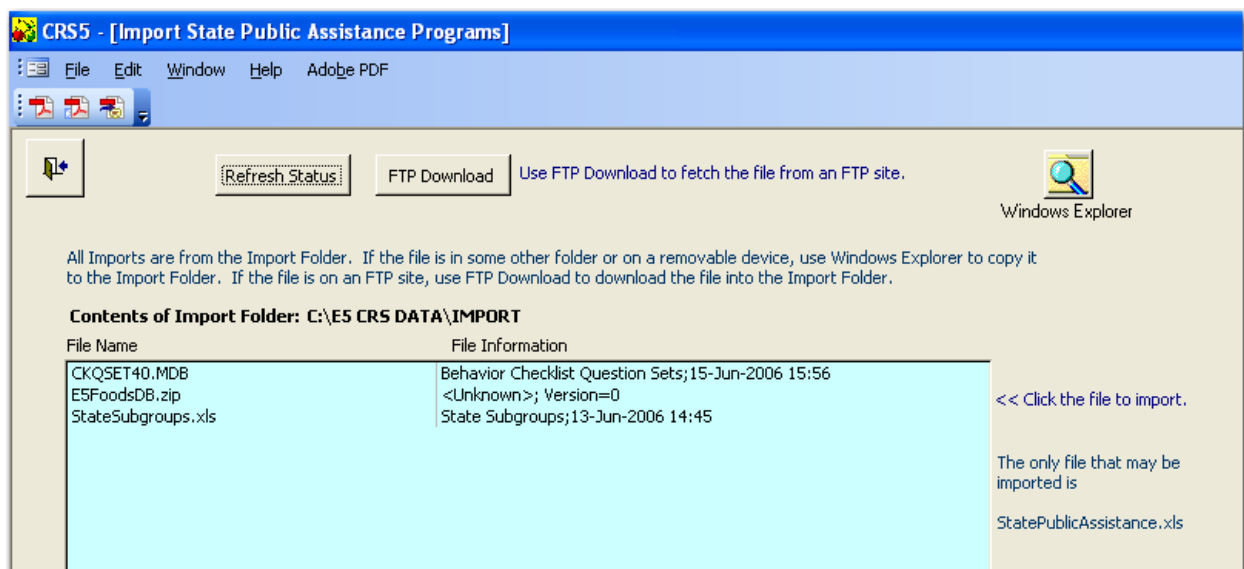
There are three options for deploying these subgroups to the county level.

1. Upload this **StatePublicAssistance.xls** file to your FTP site that county users may access within CRS5 with a username and password that you have provided them. This option will automatically place this file in the correct location.
2. This file can be e-mailed to the counties and then they must save it on their hard drive in the appropriate folder.
 - a. Log into CRS5 and attach the DB that you want to import the State Subgroups for.
 - b. Click 
 - c. Click 
 - d. This step simply creates the folder where your imports need to be saved.

- e. Go back to the e-mail with the attached **StatePublicAssistance.xls** file and save it to the appropriate folder. C:/E5 CRS Data/*UnitName*/IMPORT
 - i. Each unit will have to have its own IMPORT folder.



- f. Go back to CRS5 and click  and you should see the file show up in the blue box.
- g. Click on the file name to perform the import



CRS5 - [Import State Public Assistance]

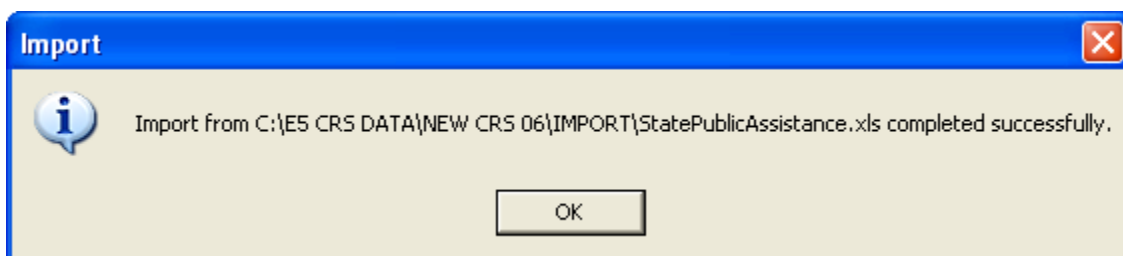
File Edit Insert Records Window Help

Import State Public Assistance Programs?


Any existing State Public Assistance Programs will be replaced by these programs.

State	Program Name	Food Assistance
GA	Applying for Food Stamps	
GA	Child Health Plus	
GA	Emergency Feeding Sites or Soup Kitchens	YES
GA	Food Pantries	YES
GA	Medicaid/Medicare	
GA	Senior Dining Sites	YES
GA	Social Security Disability	
GA	Supplemental Security Income	

- Click YES



- Click OK

- Click the  Backdoor out to the Main Switchboard.

3. If you create your State Public Assistance list and save it to a removable media disk (CD, flash drive, floppy disk) the file must be saved onto the computer's hard drive in the correct folder. You can follow the e-mail directions from #2 above to go through the same process of saving and importing your Public Assistance list.

9. The Nutrition Switchboard

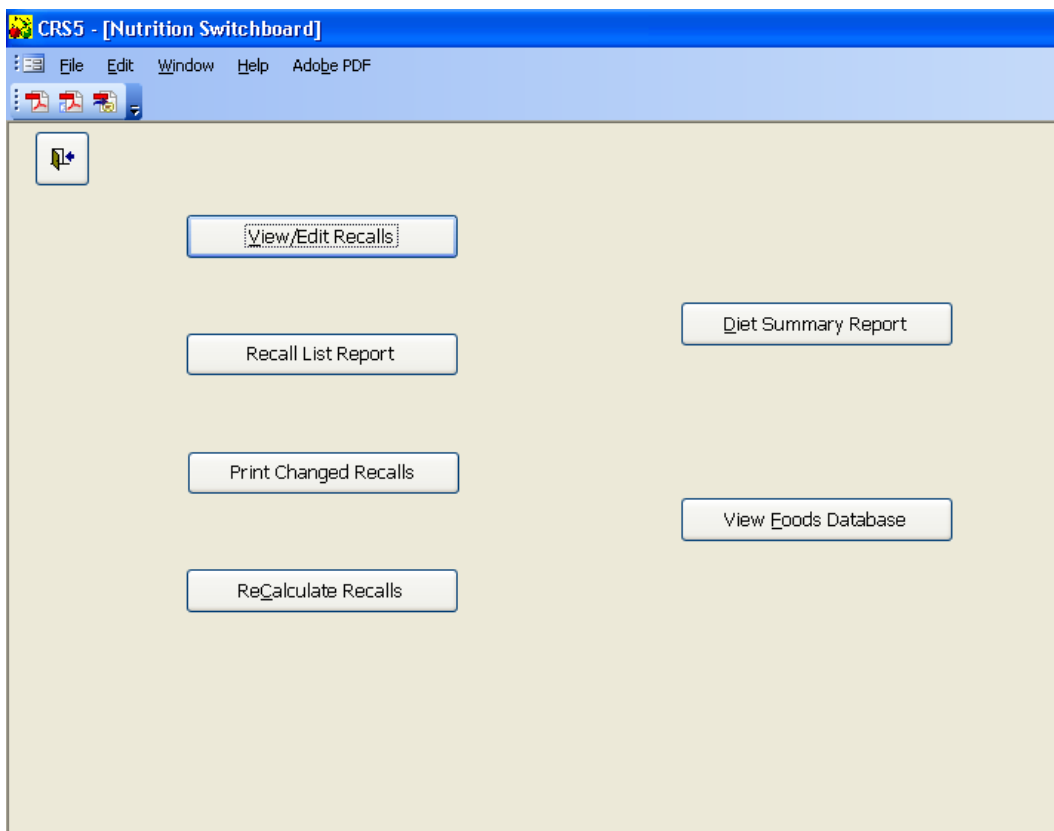
9.1. Accessing Diet Recalls

There are three ways to access the Nutrition section.

1. Nutrition Switchboard
2. Adult Switchboard
3. Individual Client Record

1. Nutrition Switchboard

- If you wish to access the recalls for clients from the Nutrition Switchboard go to the Main Switchboard and click NUTRITION.
- Click **View/Edit Recalls**



This screen looks similar to the Adult screen. The new categories of city, staff, and program status also appear here.

- You can sort by these categories as well. Click directly on the column header, once for ascending order or twice for descending order.
- The unique columns on this screen are the “# of Recalls” and “RM”.
 - The # of Recalls column appears so that you can immediately identify who may be missing diet recalls.
 - The column “RM” stands for Recall Method and it corresponds to the list above it that tells how this diet recall was analyzed.
- After the blue explode button there is an additional column that indicates the # of recalls that the client had in ERS4, such as 2E4 (2ERS4 Recalls) or 1E4 (1ERS4 Recall). More information concerning the ERS4 conversion/migration will follow this section.
- Click on the **BLUE EXPLODE** button to enter the client’s individual record and edit food recalls.

CRS5 - [Adult Recalls]

File Edit Window Help Adobe PDF

Locate Adult ID: Staff Filter: <ALL>

C=Computerized
F=Food Group
E=External

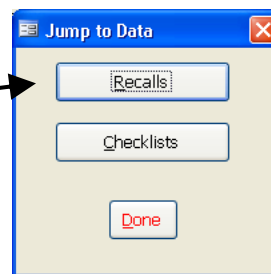
ID	Name	City	Staff	Program Status	# Recalls	R M	
3370	BISSI, TERESA	CHESAPEAKE VA	P00001	Active	1	E	1E4
3371	LEWIS, LANESHA	CHESAPEAKE VA	P00001	Active	1	E	1E4
3372	HARTLEY, DONNA	CHESAPEAKE VA	P00001	Active	1	E	1E4
3373	WHITEHURST, DESTINY	CHESAPEAKE VA	P00004	Active	1	E	1E4
3374	MURRAY, TAMAKIA	CHESAPEAKE VA	P00004	Active	1	E	1E4
3375	TENNY, CHARLENE	CHESAPEAKE VA	P00004	Active	1	E	1E4
3377	TURNER, SHEENA	CHESAPEAKE VA	P00001	Active	1	E	1E4
3379	ROSENFELDT, EDNA	CHESAPEAKE VA	P00005	Active	1	E	1E4
3380	ELICK, LISA	CHESAPEAKE VA	P00005	Active	1	E	1E4
3381	WILLIAMS, SUMMER	CHESAPEAKE VA	P00005	Active	1	E	1E4
3382	PENLAND, SHELLY L	CHESAPEAKE VA	P00005	Active	1	E	1E4
3383	McLAURIN, TAMIKA A	CHESAPEAKE VA	P00005	Active	1	E	1E4
3384	FREDRICK, CHANCLA	CHESAPEAKE VA	P00005	Active	1	E	1E4
3385	LOMAX, SABRINA	CHESAPEAKE VA	P00004	Active	1	E	1E4
		CHESAPEAKE VA	P00004	Active	1	E	1E4

2. Adult Switchboard

- From the “Main Switchboard” Click on ADULTS
- Click on View/Edit Adults – which should bring you to the following screen.

ID	Name	City	Staff	Program Status
2620	THOMAS, LaTONYA	CHESAPEAKE VA	P00004-DORIA MITCHELL	Ed. objectives met
2625	SMITH, MICHELLE B	CHESAPEAKE VA	P00004-DORIA MITCHELL	Ed. objectives met
2682	LENA, MICHELE	CHESAPEAKE VA	P00001-IRIS BUFKA	Ed. objectives met
2686	ROOK, REBECCA	CHESAPEAKE VA	P00001-IRIS BUFKA	Ed. objectives met
2709	ROBERTSON, SHARAL	CHESAPEAKE VA	P00004-DORIA MITCHELL	Ed. objectives met
2720	DANIELS, JESSICA	CHESAPEAKE VA	P00001-IRIS BUFKA	Ed. objectives met

- Select the Client you wish to enter RECALLS for by clicking on the **PURPLE** Button in the middle.
- Click **Recalls**
 - Click **ADD RECALL** if you need to enter a new diet recall for this client
 - Click the **BLUE EXPLODE** button if you wish to edit a recall that already exists.



Recalls for: 3371 - LEWIS, LANESHA

PP: P00001 - BUFKA, IRIS

Convert ERS4 Recall

Add Recall

Date	Pregnant	Nursing	Exit	#Meals	HEI	Method
01-Oct-2002		<input type="checkbox"/>	<input type="checkbox"/>	3	0.0	E

Record: 1 of 1

C=Computerized
F=Food Group
E=External

Save Cancel

3. Individual Client Record

- If you are already in a client's record you can jump directly to the Recall section by clicking on the **PURPLE** button labeled "J"

The screenshot shows the 'CRS5 - [Edit Adult]' form. A black arrow points from the text 'PURPLE button labeled "J"' to a small purple button with the letter 'J' located next to the 'Exit Recall' date field (06/13/00). The form contains various fields for client information, including ID, PP, Name, Address, City-State-ZIP, County, FIPS Code, Ethnicity, Race, and Program Status. A 'Jump to Data' button is also visible at the bottom right of the form.

- You will get the following options:
- Choose Recalls and follow the directions above from #1.

The 'Jump to Data' dialog box has a blue title bar with the text 'Jump to Data' and a red 'X' button. It contains three buttons: 'Recalls', 'Checklists', and 'Done'. The 'Recalls' button is highlighted with a dashed border.

9.2. New CRS5 Features in the Nutrition Switchboard

- This screen shows the individual recalls for a client. You have three options on this screen.
 - If you have converted your DB from ERS4 your screen will look like the one below.
 - Please note the column titled “Method”
 - If you were using the Computerized Analysis method for Diet Recalls in ERS4 your recalls will convert over into CRS5 automatically. This is referred to as the “External Method.” See next page for more information on this.
 - If you were using the Food Group Analysis for Diet Recalls in ERS4 then your recalls should convert over into CRS5 using the same method (Food Group Analysis).
 - Click on the **BLUE Explode** button to enter an existing individual recall.

The screenshot shows the 'CRS5 - [Recalls]' window. At the top, it displays 'Recalls for: 3371 - LEWIS, LANESHA' and 'PP: P00001 - BUFKA, IRIS'. There are two buttons on the right: 'Convert ERS4 Recall' and 'Add Recall'. Below this is a table with columns: Date, Pregnant, Nursing, Exit, #Meals, HEI, and Method. The first row shows a date of 01-Oct-2002, with checkboxes for Pregnant, Nursing, and Exit, 3 meals, HEI of 0.0, and Method 'E'. To the right of the table are four icons: a blue square with three dots, a printer, a key, and a red X. Below the table is a record navigation bar with 'Record: 1 of 1' and navigation buttons. At the bottom right, a legend defines the methods: C=Computerized, F=Food Group, and E=External. At the bottom center are 'Save' and 'Cancel' buttons.

Date	Pregnant	Nursing	Exit	#Meals	HEI	Method
01-Oct-2002	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3	0.0	E

Record: 1 of 1

C=Computerized
F=Food Group
E=External

- This is the screen shot of a client who has had her ERS4 recall converted into CRS5 using the external method. (This happened automatically when the ERS4 DB migrated into CRS5.)

CRS5 - [Edit Recall - Using External Analysis]

File Edit Window Help Adobe PDF

Recall Date: 01-Feb-2000 PP: P00001 BUFKA, IRIS
2845 - VIDALLON, REBECCA

Age: 20 Gender: Female Is Pregnant: ☒ Is Nursing: ☐ Taking Nutritional Supplements: ☒
Amount spent on food last month: \$300 Entry Date: 01-Feb-2000 Exit Interview: ☐
Exit Date: 17-Feb-2001

Activity Level
Not Provided
Less than 30 min.
30-60 minutes
More than 60 min.

Number of Meals: 0
1
2
3
4
5
6

Food Group Amounts
Fruits (cup): 0.6
Vegetables (cup): 0.5
Grains (oz eq): 9.5
Meat & Beans (oz eq): 7.5
Milk (cup): 1.7

Nutrients		
▶	Alcohol	0.0 gm
	Calcium	835.0 mg
	Carbohydrate	277.9 gm
	Cholesterol	0.0 mg
	Food Energy	1,932.0 kcal
	Iron	20.1 mg
	Protein	88.6 gm
	Saturated Fat	0.0 gm
	Sodium	0.0 mg
	Total Dietary Fiber	15.1 gm
	Total Fat	53.7 gm
	Vitamin A (RE)	1,075.5 RE
	Vitamin B-6	2.5 mg
	Vitamin C	83.5 mg
	Vitamin E	0.0 ATE

Record: 1 of 1

Use CTRL-TAB to tab out of Nutrients

Save Cancel

- Note that you may enter the client's activity level here if you have obtained that information. For recalls that have been converted the default setting is "Not Provided." For NEW recalls the default is set to sedentary for computing calories.
- Notice that all of the dietary information is there, but there is no way to edit individual food items.
- Once the recall is converted into CRS5 you will not be able to edit individual food items unless you delete this External Method Recall and manually convert the entire ERS4 recall. This process is explained in the following section titled "Converting ERS4 Recalls to CRS5."
- Click **SAVE** to return to the Recalls Screen.

- When ERS4 data is migrated into CRS5, diet recalls analyzed by computer analysis (C) become "E"- External Analysis! If both entry and exit recalls are from ERS4 and no changes need to be made, the process is complete and nothing further needs to be done.
- If the entry recall was in ERS4, and an exit recall has not been entered, the ERS4 recall must be converted, food by food. See the following section titled "Converting ERS4 Recalls to CRS5."

From the Recalls Screen you may want to preview an individual report or recall summary. When you are on this screen click the PRINTER icon and you will come to the following screen.

- The **Participant Diagnostic Report** is not available.
- The **Food Recall Review** is not available if your reports were converted using the External Analysis Method (E). If you convert recalls or enter new recalls in CRS5 this feature will work for you.
- The **One Day Recall Summary** is available. Please note the example found below.

Print Report

Select the report type then click PRINT or PREVIEW

Report Type


Participant Diagnostic Report


Food Recall Review

One Day Recall Summary

The Participant Diagnostic Report is not available.

☐ Omit Participant Name

 Print

 Preview

Cancel

One Day Food Recall Summary

County: VA550 Chesapeake EFNEP

Family: 3123 - LARSON, KIM

P00001 - BUFKA, IRIS

Recall Date: 01/23/02

Exit Recall

Number of previous recalls:

Family Size: 6

Female Age 36 Nursing

Amount spent on food last month: \$480

Taking nutritional supplements: No

Food Summary

	Your Intake	Recommended Amounts
Fruits (cup)	0 ½	1 ½
Vegetables (cup)	1 ½	2 ½
Grains (oz eq)	4 ½	6
Meat & Beans (oz eq)	5	5
Milk (cup)	1	3



Calories (kcal) 1753 1800

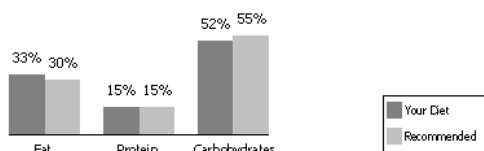
Your Activity Level: Not Provided

Sodium not available

Nutrient Summary

Nutrient	Your Intake	%RDA	Percent of RDA
Protein	65 g	101%	100
Iron	6 mg	38%	25
Calcium	579 mg	58%	50
Vitamin A	363 RE	28%	25
Vitamin C	132 mg	139%	100
Vitamin B6	15 mg	72%	75
Fiber	16 g	81%	75

Sources of Calories



9.3. Converting ERS4 Recalls to CRS5 - Method 1 Status

- If both entry and exit recalls were entered for a client in ERS4 the recalls do NOT have to be converted manually.
- If only an entry recall was entered for a client in ERS4, it will be necessary to convert this recall to CRS5 before you can add an exit recall. This is because both entry and exit recalls must be in the same format.
- From an individual RECALL screen, click **CONVERT ERS4 RECALL**

CRS5 - [Recalls]

File Edit Window Help Adobe PDF

Recalls for: 3250 - ELLIS, AMY

PP: P00004 - MITCHELL, DORIA

Convert ERS4 Recall

Add Recall

	Date	Pregnant	Nursing	Exit	#Meals	HEI	Method	
▶	07-Dec-2001	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3	0.0	3	...
	04-Dec-2002	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	3	0.0	3	...

Record: 1 of 2

1=Computerized
2=Food Group
3=External

Save Cancel

- Because these recalls were converted into CRS5 using the External Analysis Method (#3) you will see the following screen

Delete Imported ERS4 Recalls?

?

In order to convert an ERS4 recall to a CRS5 recall, we must delete the existing ERS4 External Analysis recalls for this participant. Click OK to delete them and continue, click CANCEL to not delete them.

*** THIS CANNOT BE UNDONE ***

OK Cancel

- This screen simply means that clicking OK will delete the External Analysis recalls. The ERS4 food items are still there and you can convert them individually. Click **OK** to continue

- Now you will see the screen that shows all of the foods on this recall from ERS4.
- Starting with the first food item, Click **CONVERT**

Meal Items For: 3250 - ELLIS, AMY
Recall Date: 07-Dec-01

Meal	Description	Qty	Unit Description	Convert
Morning	COFFEE, REGULAR OR DECAFE	8.00	FL OUNCE	Convert
Morning	BANANA	1.00	BANANA	Convert
Noon	BEVERAGE, SODA, COLA TYPE	16.00	FL OUNCE	Convert
Noon	FRENCH FRIES, MCDONALDS, SMALL	1.00	SERVING	Convert
Noon	HAMBURGER, MCD, MCLEAN DELUXE	1.00	SANDWICH	Convert
LateEve	BEVERAGE, KOOL AID	16.00	FL OUNCE	Convert
LateEve	CRACKER, WHOLE WHEAT	8.00	CRACKER	Convert
LateEve	SALAD, CHICKEN OR TURKEY	1.00	CUP	Convert

Record: 1 of 8

- The following screen shows you the keywords in CRS5 that closely match your previous food entry in ERS4.

ERS 4 Food Word Selection

Select the words to include in the search.

Food Words

- JUICE
- ORANGE
- FRESH

Clear Selections

OK

TIP: Choose the broadest category first. You will get a longer list of possible choices and you will be more likely to find the correct food. If you choose too many key words you may not get any correct matches because your search was too narrow. For example, just choose ORANGE by highlighting it and clicking OK. There are 84 possible choices. If you choose ORANGE, JUICE, and FRESH there are 2 results. Just remember to choose the broadest category from the keywords and then choose the correct food from the next list that comes up.

- Highlight your choice of **JUICE** and **ORANGE** and click **OK**.
- On this screen you can see the corresponding ERS4 Food Item

- If this list is too long you still have the option to type additional key words on this screen to help narrow your search. Simply type another keyword after ORANGE JUICE to narrow down the list.

TIP: Clicking on the Blue explode box will bring back the ERS4 Food Word Selection Box that you saw above.

TIP: If you are converting recalls from ERS4 into CRS5 it would be very beneficial to have the actual 24 hour food recall in front of you to help increase accuracy. Since there are thousands more choices of foods in the new database, you may find an item here that more accurately reflects what your client actually ate. You may not have had that option in ERS4 and were forced to choose the best match available. If the recall were available for this client I would be able to know more specifically what kind of coffee they actually had that morning for breakfast.

- Find the food item from the list that is the most accurate match for the ERS4 Food Item. In this case, I would choose ORANGE JUICE.
- Once you highlight ORANGE JUICE you are taken to the Food Quantity screen
- On this screen you must make sure that something is selected in all three areas. You will not have the option to save this until something is entered for **Meal Type, Portion Size, and Number of Portions.**

Food Quantity

<< Back

Select the Meal Type and Portion Size. Then enter the number of portions.

Description: ORANGE JUICE

ERS4 Qty x Unit: 16 x FL OUNCE

Meal Type

- Morning meal or snack
- Midmorning meal or snack
- Noontime meal or snack
- Afternoon meal or snack
- Evening meal or snack
- Late evening meal or snack

Portion Size

- 1 cup
- 1 fl oz
- Don't Know

Number of Portions

0

After entering an amount, press the Enter key to activate the Save button.

Save Cancel

- The Meal Type will default to the corresponding meal that was previously selected in ERS4.
- The previously entered **ERS4 Quantity x Unit** is displayed on this screen for reference. For this example – highlight 1 fl oz. for the portion size because it corresponds to the FL OUNCE unit previously used in ERS4.
- Then use the TAB key to go to NUMBER OF PORTIONS and enter 16 to reflect the 16 FL OZ. from ERS4. Or you could select 1 Cup (8 fl oz) and then enter 2 for Number of Portions.
- After entering the amount, press the **ENTER** key or the **TAB** key to activate the Save button.
- Click **SAVE** to save the record of this food item

Food Quantity

<< Back

Select the Meal Type and Portion Size. Then enter the number of portions.

Description: ORANGE JUICE

ERS4 Qty x Unit: 16 x FL OUNCE

Meal Type

- Morning meal or snack
- Midmorning meal or snack
- Noontime meal or snack
- Afternoon meal or snack
- Evening meal or snack
- Late evening meal or snack

Portion Size

- 1 cup
- 1 fl oz
- Don't Know

Number of Portions

0

After entering an amount, press the Enter key to activate the Save button.

Save Cancel

- You are now back at the Convert ERS4 Food Items to CRS5 screen.

CRS5 - [Convert ERS 4 Food Items to ERS 5]

File Edit Window Help Adobe PDF

Meal Items for: 3250 - ELLIS, AMY
Recall Date: 07-Dec-01

Meal	Description	Qty	Unit Description		Convert	
Morning	COFFEE, REGULAR OR DECAFE	8.00	FL OUNCE	✓	Convert	✗
Morning	BANANA	1.00	BANANA		Convert	✗
Noon	BEVERAGE, SODA, COLA TYPE	16.00	FL OUNCE		Convert	✗
Noon	FRENCH FRIES, MCDONALDS, SMALL	1.00	SERVING		Convert	✗
Noon	HAMBURGER, MCD, MCLEAN DELUXE	1.00	SANDWICH		Convert	✗
LateEve	BEVERAGE, KOOL AID	16.00	FL OUNCE	✓	Convert	✗
LateEve	CRACKER, WHOLE WHEAT	8.00	CRACKER		Convert	✗
LateEve	SALAD, CHICKEN OR TURKEY	1.00	CUP	✓	Convert	✗

Record: [Previous] [Next] 2 of 8

- Notice the checkmark next to the Coffee entry. This means that it has been successfully converted into CRS5.
- You may now follow the preceding steps to convert the rest of the food items on this recall.

- When all of the items have been successfully converted you can back out of this screen and back out of the Meal Items Screen to return to Edit Recall screen.
- You can now see all of the nutrient analysis for this recall.

CRS5 - [Edit Recall - Using Foods Database]

File Edit Window Help Adobe PDF

Recall Date: 04-May-1999 PP: P00004 MITCHELL, DORIA
2620 - THOMAS, LaTONYA

Age: 20 Gender: Female Is Pregnant: ☐ Is Nursing: ☐ Taking Nutritional Supplements: ☐
Amount spent on food last month: \$250 Entry Date: 04-May-1999 Exit Interview: ☐
Exit Date: 04-May-2000

Number of Meals: 4

Food Group Amounts

Fruits (cup):	1.5
Vegetables (cup):	2.8
Grains (oz eq):	5.6
Meat & Beans (oz eq):	9.4
Milk (cup):	1.6

Healthy Eating Index

Fruit:	7.5
Vegetable:	10.0
Grains:	9.3
Meat & Beans:	10.0
Milk:	5.3
Total Fat:	7.2
Saturated Fat:	8.5
Sodium:	0.7
Cholesterol:	0.0
Variety:	10.0
Total HEI	68.5

Nutrients

Alcohol	0.0 gm
Calcium	832.3 mg
Carbohydrate	255.0 gm
Cholesterol	634.8 mg
Food Energy	2,255.4 kcal
Iron	14.2 mg
Protein	124.4 gm
Saturated Fat	26.9 gm
Sodium	4,633.6 mg
Total Dietary Fiber	17.3 gm
Total Fat	85.6 gm
Vitamin A (RE)	531.1 RE
Vitamin B-6	2.4 mg
Vitamin C	164.3 mg
Vitamin E	7.9 ATE

Record: 1 of 1

Activity Level: Not Provided
Less than 30 min.
30-60 minutes
More than 60 min.

View/Edit Food Items

Save Cancel

- Click **Save**
- Click **Save** again to exit this Recall screen.

CRS5 - [Recalls]

File Edit Window Help Adobe PDF

Recalls for: 3250 - ELLIS, AMY
PP: P00004 - MITCHELL, DORIA

Add Recall

Date	Pregnant	Nursing	Exit	#Meals	HEI	Method
NEW CHG 07-Dec-2001	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3	67.7	1
NEW CHG 04-Dec-2002	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	3	60.8	1

Record: 1 of 2

1=Computerized
2=Food Group
3=External

Save Cancel

10. The Checklist Switchboard

10.1. Accessing Behavior Checklists

There are three ways to access the Behavior Checklist section:

1. Adult Switchboard – “View/Edit Adults” screen
2. Checklist Switchboard – “View/Edit Checklists”
3. Individual Client Record – “Edit Adult” screen

1. Adult Switchboard

- From the “Main Switchboard” Click on ADULTS
- Click on View/Edit Adults – which will bring you to the following screen.

ID	Name	City	Staff	Program Status
2620	THOMAS, LaTONYA	CHESAPEAKE VA	P00004-DORIA MITCHELL	Ed. objectives met
2625	SMITH, MICHELLE B	CHESAPEAKE VA	P00004-DORIA MITCHELL	Ed. objectives met
2682	LENA, MICHELE	CHESAPEAKE VA	P00001-IRIS BUFKA	Ed. objectives met
2686	ROOK, REBECCA	CHESAPEAKE VA	P00001-IRIS BUFKA	Ed. objectives met
2709	ROBERTSON, SHARAL	CHESAPEAKE VA	P00004-DORIA MITCHELL	Ed. objectives met
2720	DANIELS, JESSICA	CHESAPEAKE VA	P00001-IRIS BUFKA	Ed. objectives met

- Select the Client you wish to enter checklist for by clicking on the **PURPLE** box in the middle.
- Click **CHECKLISTS**
 - Click **ADD SURVEY** if you need to enter a new checklist for this client
 - Click the **BLUE EXPLODE** button if you wish to edit a checklist that already exists.

Date	Exit	Interview
04-May-1999	<input type="checkbox"/>	<input type="checkbox"/>
04-May-2000	<input checked="" type="checkbox"/>	<input type="checkbox"/>

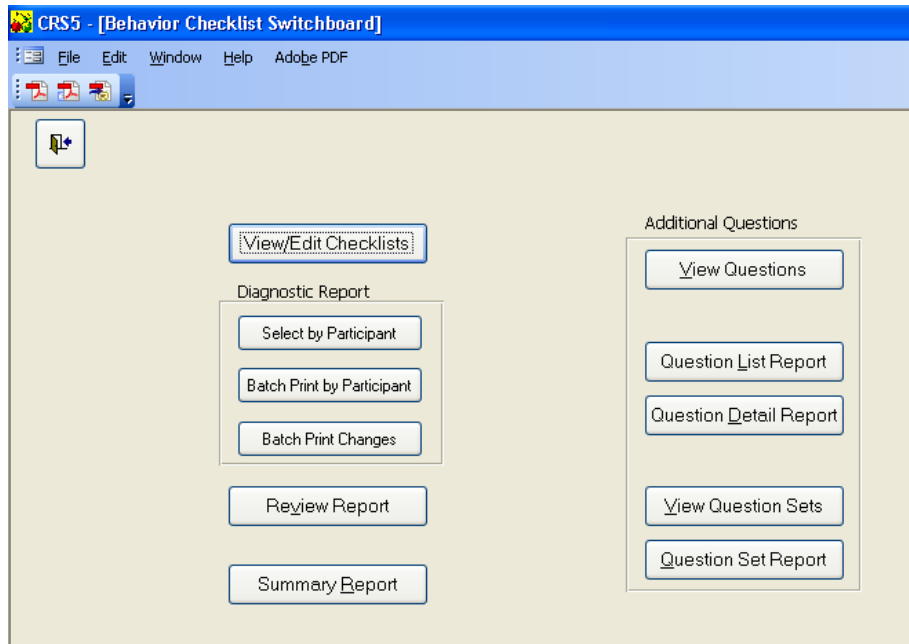
TIP - To change the date of Checklists that you have already entered you must do it on this screen. Click **CHANGE SURVEY DATE**

Date	Exit	Interview
04-May-2005	<input type="checkbox"/>	<input type="checkbox"/>
04-May-2006	<input checked="" type="checkbox"/>	<input type="checkbox"/>

CHECKLISTS will migrate from ERS4 unchanged. They will appear as they did before and you can continue to enter the data as you were doing in ERS4.

2. Checklist Switchboard

- From the Checklist Switchboard you can access the checklists for clients.
- Go to the Main Switchboard and click CHECKLISTS.



- Click on View/Edit Checklists

ID	Name	City	Staff	Program Status	# CkLists	
2620	THOMAS, LaTONYA	CHESAPEAKE VA	P00004	Ed. objectives met	2	...
2625	SMITH, MICHELLE B	CHESAPEAKE VA	P00004	Ed. objectives met	2	...
2682	LENA, MICHELE	CHESAPEAKE VA	P00001	Ed. objectives met	2	...
2686	ROOK, REBECCA	CHESAPEAKE VA	P00001	Ed. objectives met	2	...
2709	ROBERTSON, SHARAL	CHESAPEAKE VA	P00004	Ed. objectives met	2	...
2720	DANIELS, JESSICA	CHESAPEAKE VA	P00001	Ed. objectives met	2	...
2722	ROMAN, JANNETTE	CHESAPEAKE VA	P00001	Ed. objectives met	2	...
2782	GATLIN, LaTASHA	CHESAPEAKE VA	P00001	Ed. objectives met	2	...
2840	BYRANT, PAULINE	CHESAPEAKE VA	P00001	Ed. objectives met	2	...
2845	VIDALLON, REBECCA	CHESAPEAKE VA	P00001	Ed. objectives met	2	...
2971	DAVIS, LYNN	CHESAPEAKE VA	P00001	Ed. objectives met	2	...

This screen looks similar to the Adult screen. The new categories of city, staff, and program status also appear here. You can sort by these categories as well. The unique column on this screen is the “# of Checklists” which appears so that you can immediately identify who may be missing behavior checklists. You can sort the list by this category by clicking directly on it, once for ascending order or twice for descending order.

3. Client Record

- If you are already in a client's record you can jump directly to the Recall or Checklist section by clicking on the PURPLE JUMP (J) box

CRS5 - [Edit Adult]

ID: 2720 PP: P00001 BUFKA, IRIS

First-Last Name: JESSICA DANIELS

Address: 1931 WOODGATE ARCH Address not verified

City-State-ZIP: CHESAPEAKE VA 23320- Verify Address

County: FIPS Code: Ethnicity: Not Hispanic/Latino

Cong. District: MSA: Lat-Long: Race: American Indian or Alaskan Native

Phone: (757) 523-2780 Ext: Race: Asian

Age: 23 Gender: Female Is Pregnant: Is Nursing: Native Hawaiian or Other Pacific Islander

Residence: Suburbs of cities over 50,000

Highest Grade: Not Supplied

Household income: 177 per month (N/S=not supplied)

Lesson Type: Both group & individual

Number of Lessons: 7

Number of Contacts: 7

Subgroups: F:EFNEP, F:ESWIC, F:FSNE, F:Sample, F:TeamNutrition

Children: Ages 0-5: 1, Ages 6-13: 0, Ages 14-19: 0

Others in Household: 2

Household Total: 4

Remarks: ER54 RaceCode=1-00 (757) 523-2780

Program Status: Ed. objectives met

Entry Date: 21-Jun-1999

Exit Date: 20-Jun-2000

Entry Recall: 06/21/99

Exit Recall: 06/20/00

Entry Checklist: 06/21/99

Exit Checklist: 06/20/00

Save Cancel

- You will get the following options:
- Click **CHECKLISTS**
 - Click **ADD SURVEY** if you need to enter a new checklist for this client
 - Click the **BLUE Explode** button if you wish to edit a checklist that already exists.

Jump to Data

Recalls

Checklists

Done

CRS5 - [Checklist]

Checklists for: 2620 - THOMAS, LaTONYA

PP: P00004 Add Survey Change Survey Date

Date	Exit	Interview
04-May-1999		
04-May-2000	✓	

Record: 1 of 2

Set ID of additional questions: YOUNGFAM

Remove Additional Questions

Save Cancel

CHECKLISTS will migrate from ERS4 unchanged. They will appear as they did before and you can continue to enter the data as you were doing in ERS4.

10.2. Entering Checklists

There are two ways to enter data on the checklist:

- Click on the corresponding numbers to enter the checklist data or
- OR
- Type in the numbers and tab between questions. Check marks will automatically appear in the response categories.
- Click **SAVE** when you are finished
- Click **SAVE** again and you will return to the Adult Checklist Screen

CRS5 - [Edit Checklist]

File Edit Window Help Adobe PDF

Participant: 2620 - THOMAS, LaTONYA PP: P00004 - MITCHELL, DORIA 5/21/1999 8:

Survey Date: 04-May-1999 Exit Survey: ☐ Interview: ☐ Set ID: YOUNGFAM

Base Questions Additional Questions

Question	N/A	Response					
		0	1	2	3	4	5
1. Plan meals ahead	2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Compare prices before buying food	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Run out of food before the end of the month	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Shop with a grocery list	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Let foods sit out for more than two hours	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Thaw frozen foods at room temperature	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Think about healthy food choices	2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Prepare foods without adding salt	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Use "Nutrition Facts" on the food label to make food choices	2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Children eat within 2 hours of waking up	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save Cancel

CRS5 - [Adult CheckLists]

File Edit Window Help Adobe PDF

Locate Adult ID: Staff Filter: <ALL>

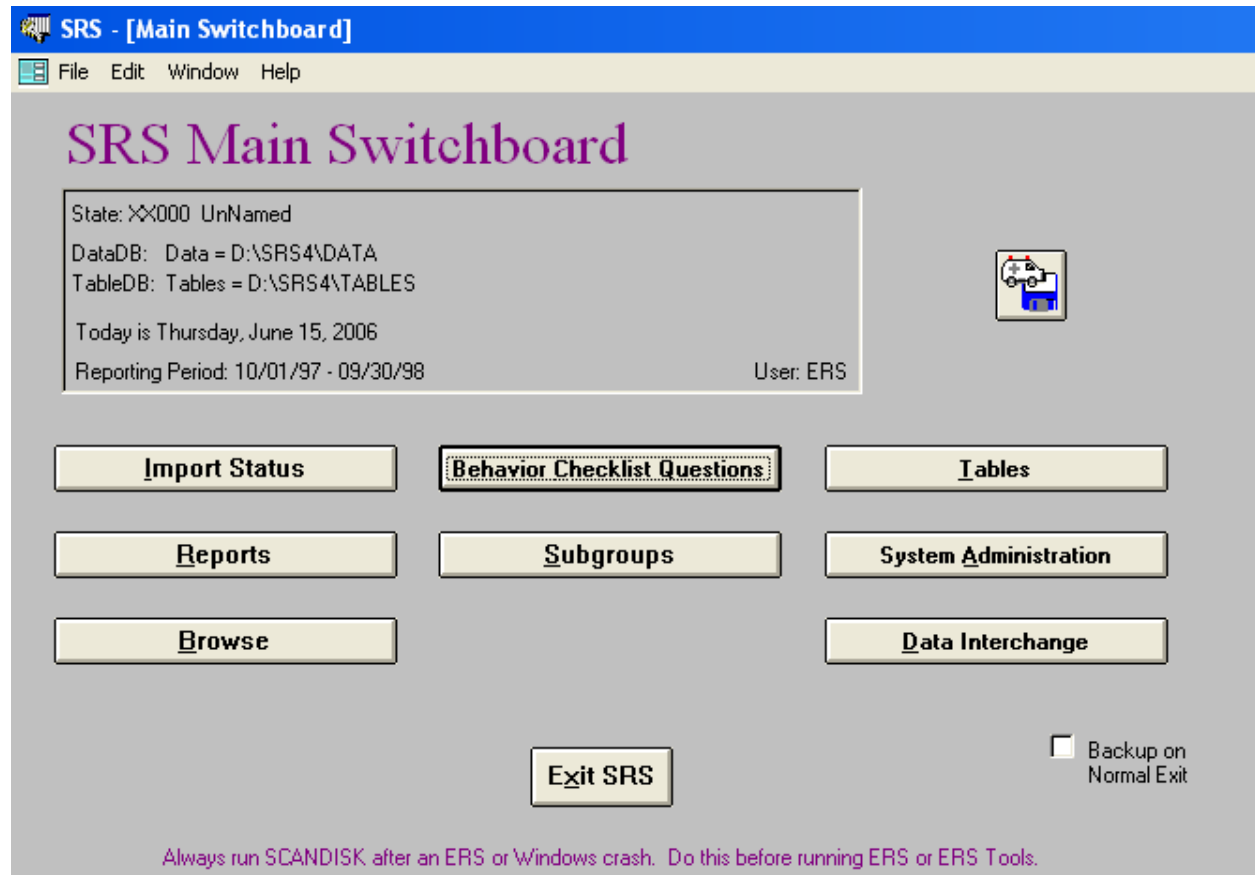
ID	Name	City	Staff	Program Status	# CkLists
2620	THOMAS, LaTONYA	CHESAPEAKE VA	P00004	Ed. objectives met	2
2625	SMITH, MICHELLE B	CHESAPEAKE VA	P00004	Ed. objectives met	2
2682	LENA, MICHELE	CHESAPEAKE VA	P00001	Ed. objectives met	2
2686	ROOK, REBECCA	CHESAPEAKE VA	P00001	Ed. objectives met	2
2709	ROBERTSON, SHARAL	CHESAPEAKE VA	P00004	Ed. objectives met	2
2720	DANIELS, JESSICA	CHESAPEAKE VA	P00001	Ed. objectives met	2

- From the ADULT CHECKLISTS screen you can “BACK DOOR” out twice to the Main Switchboard

10.3 Importing Question Sets

If you are currently using additional question sets in ERS4 you can import them into CRS5 through the Data Interchange section. You will only need to complete this step if you are currently using additional question sets in ERS4.

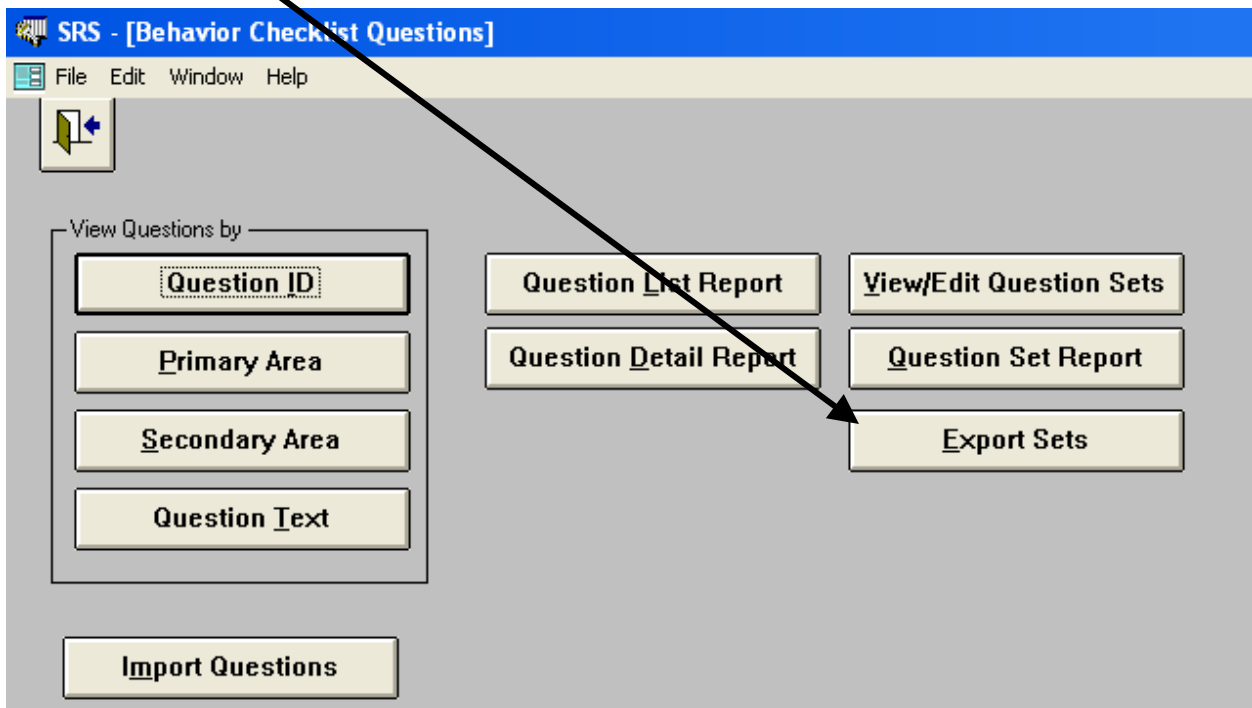
Begin in SRS4 on the Main Switchboard





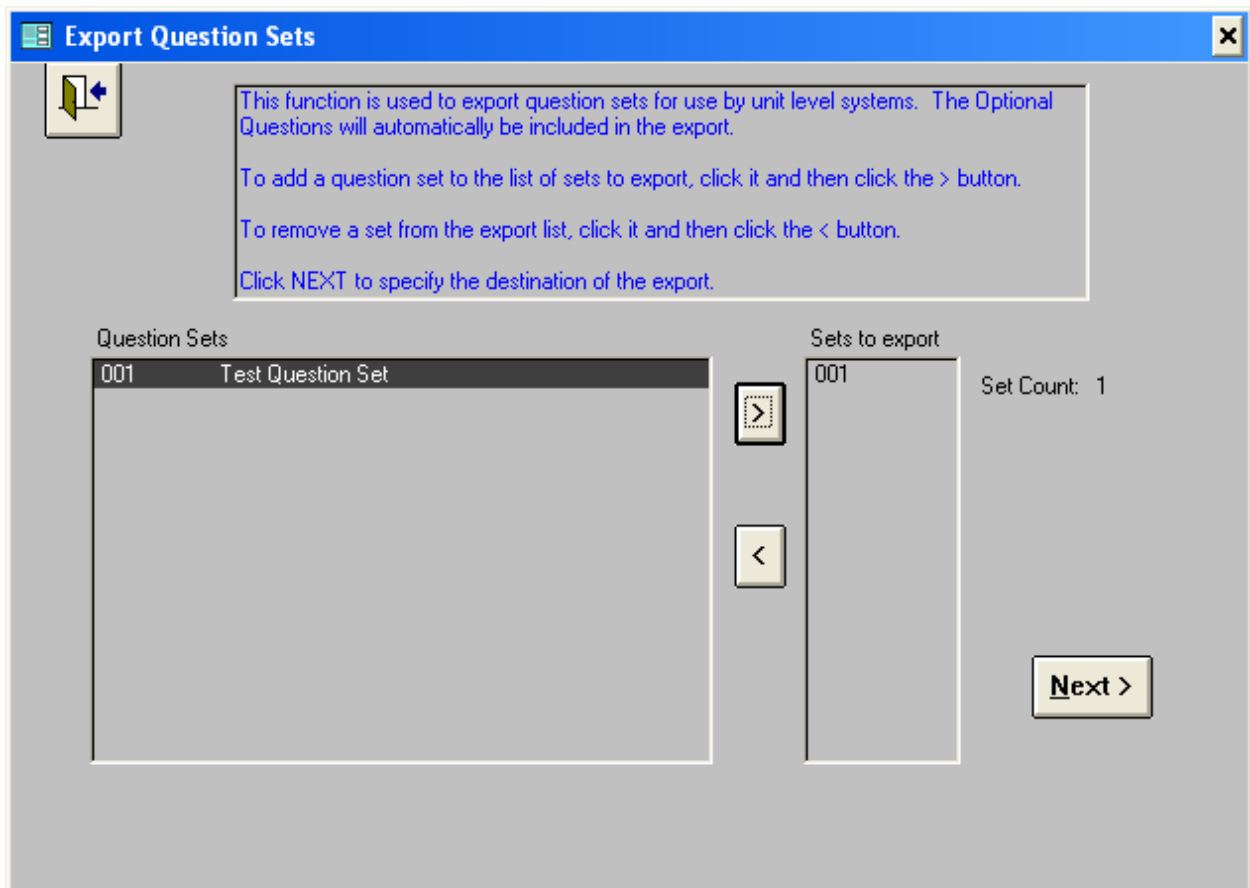
- Click on



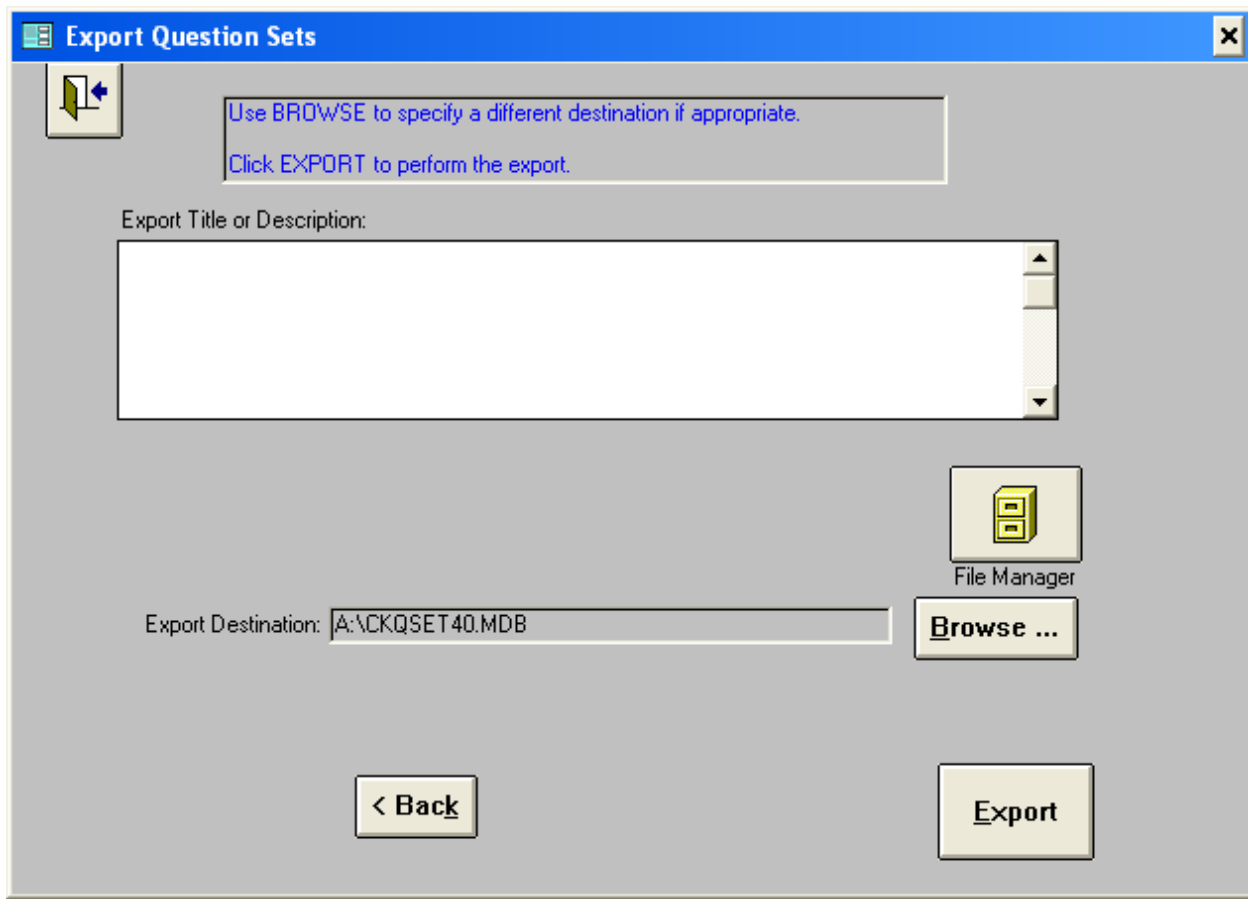
- Click on Export Sets



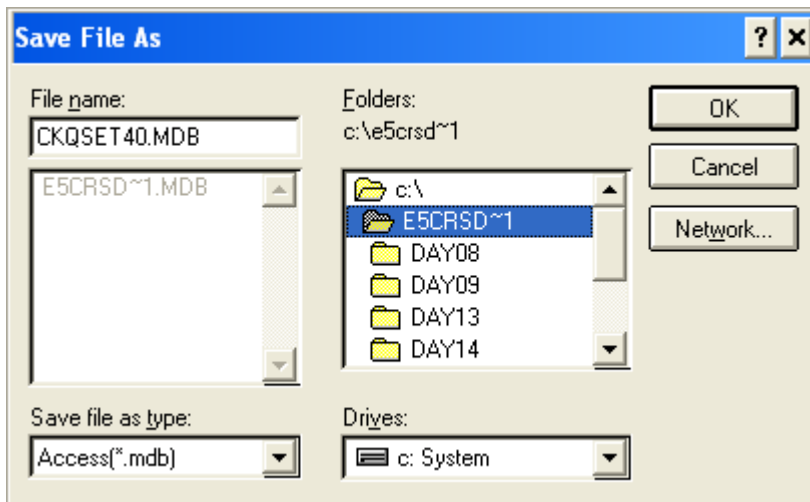
- Highlight the Question Set that you wish to export and click on the top arrow  to move the question set into the box on the right. When the number of the question set is in the Sets to Export box, click .
- Now choose a location to save the .MDB file.



- Click Browse



- You can save this file to the C:/E5 CRS Data folder since much of your other data will be here as well.
- Click OK




- Click



- Click OK

TIP: You can export multiple sets of questions if you have created them in SRS4. Just make sure that **ALL** the numbers for the question sets you want to export are in the right box.



Backdoor  out twice to the Main Switchboard and Exit SRS4.

10.2.1. Importing Checklist Questions into CRS5

There are three options for deploying these Checklist Questions to the county level.

1. Upload this **CKQSET40.MDB** file to your FTP site that county users may access within CRS5 with a username and password that you have provided them. This option will automatically place this file in the correct location.
2. This file can be e-mailed to the counties and then they must save it on their hard drive in the appropriate folder. You CANNOT e-mail an .MDB file. Numerous e-mail clients will block access to an .MDB attachment. You must change the file extension. Example:
CKQSET40.MDB.RemoveThis

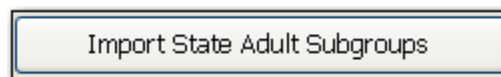
- a. These following steps create the folder where your imports need to be saved. (If you have already imported Subgroups or Public Assistance your IMPORT folder already exists and you can skip to step E.)

- b. Log into CRS5 and attach the DB where you want to import the Question Sets.

- c. Click



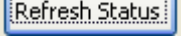
- d. Click

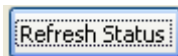


- e. Go back to the e-mail with the attached **CKQSET40.MDB.RemoveThis** file and save it to the appropriate folder. C:/E5 CRS Data/*UnitName*/IMPORT

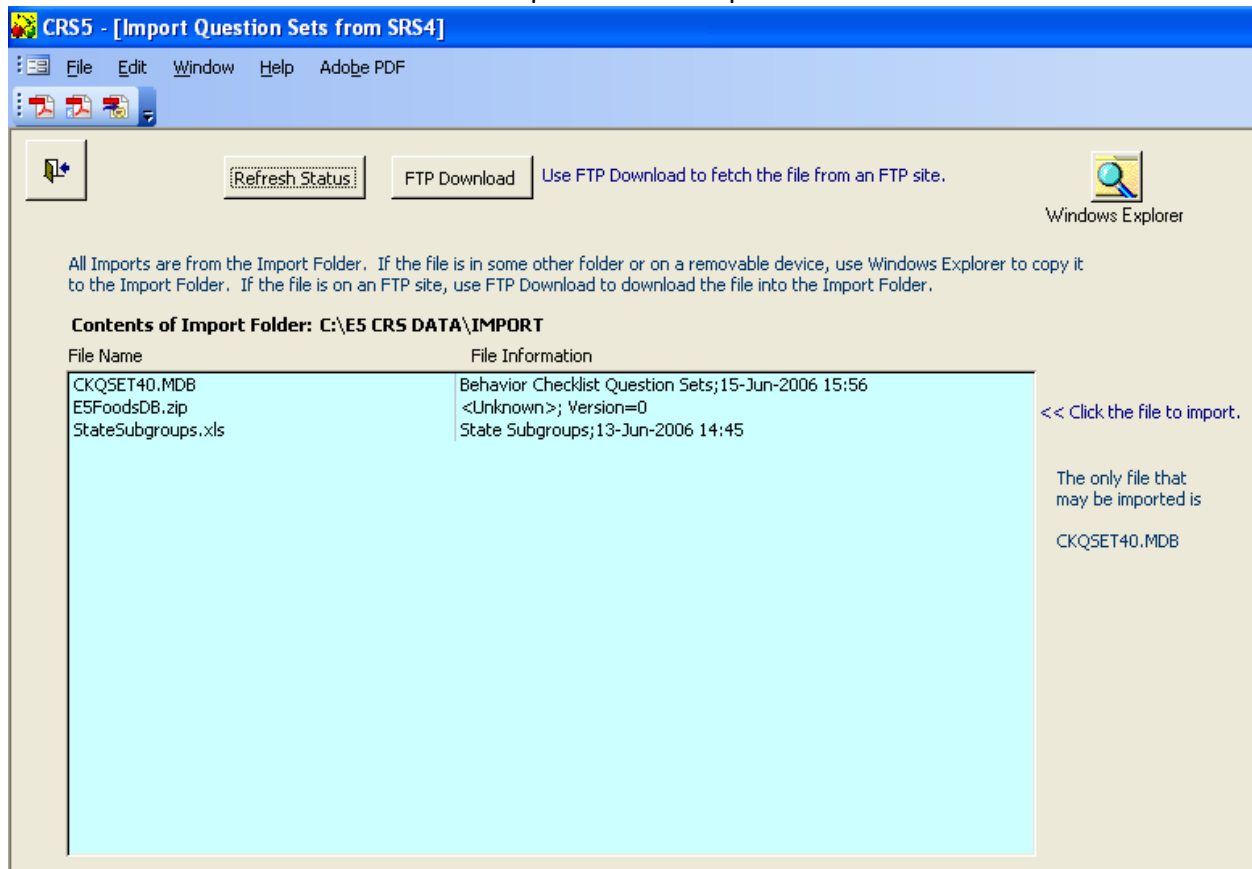
- f. When you save this file to the hard drive, simply delete the **.RemoveThis** from the file extension and save the file to the folder C:/E5 CRS Data/*UnitName*/IMPORT

- i. Each unit will have to have its own IMPORT folder.

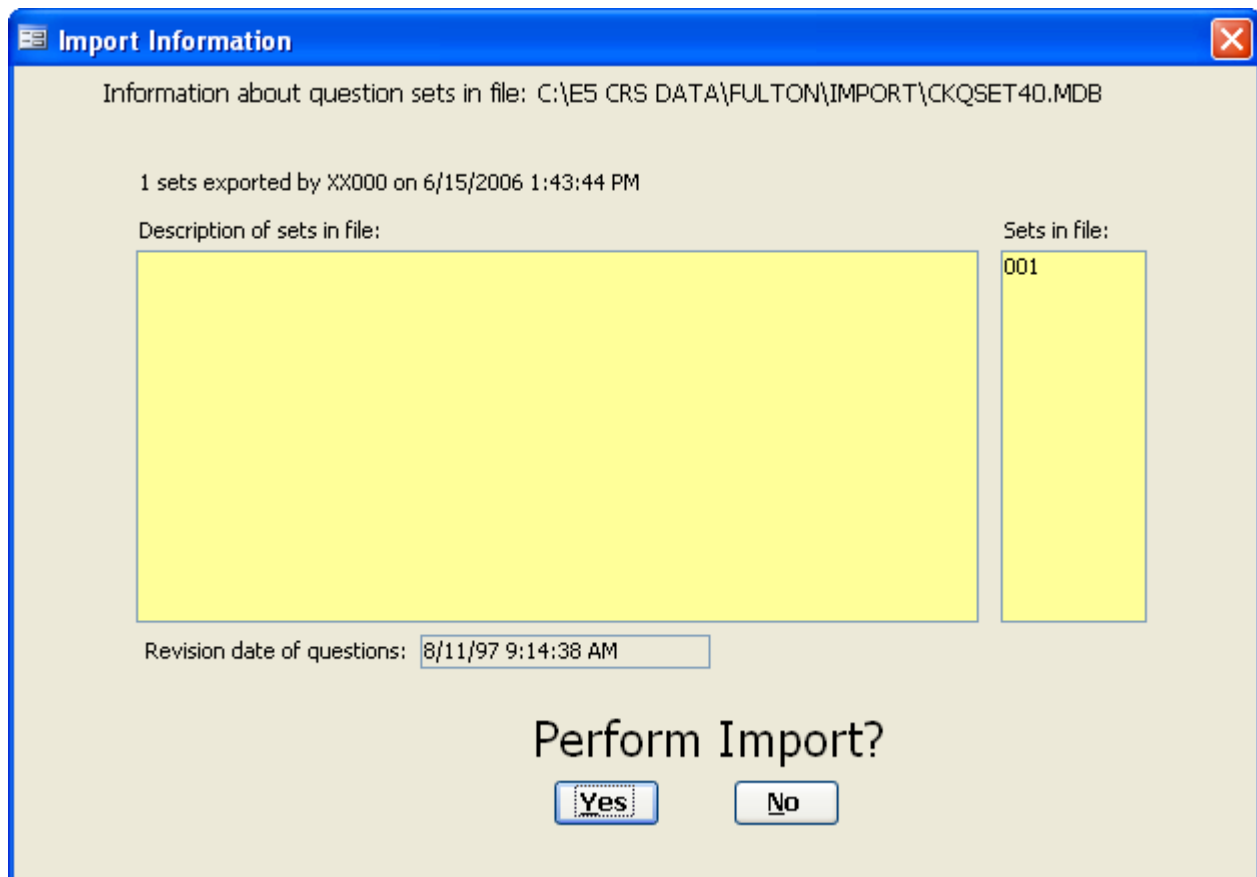
- g. Go back to CRS5 and click  and you should see the file show up in the blue box.



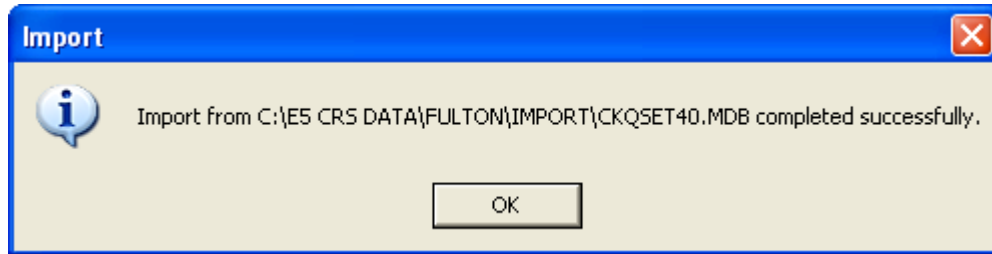
h. Click on the file name to perform the import




- Click YES




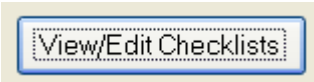
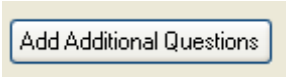
- Click OK

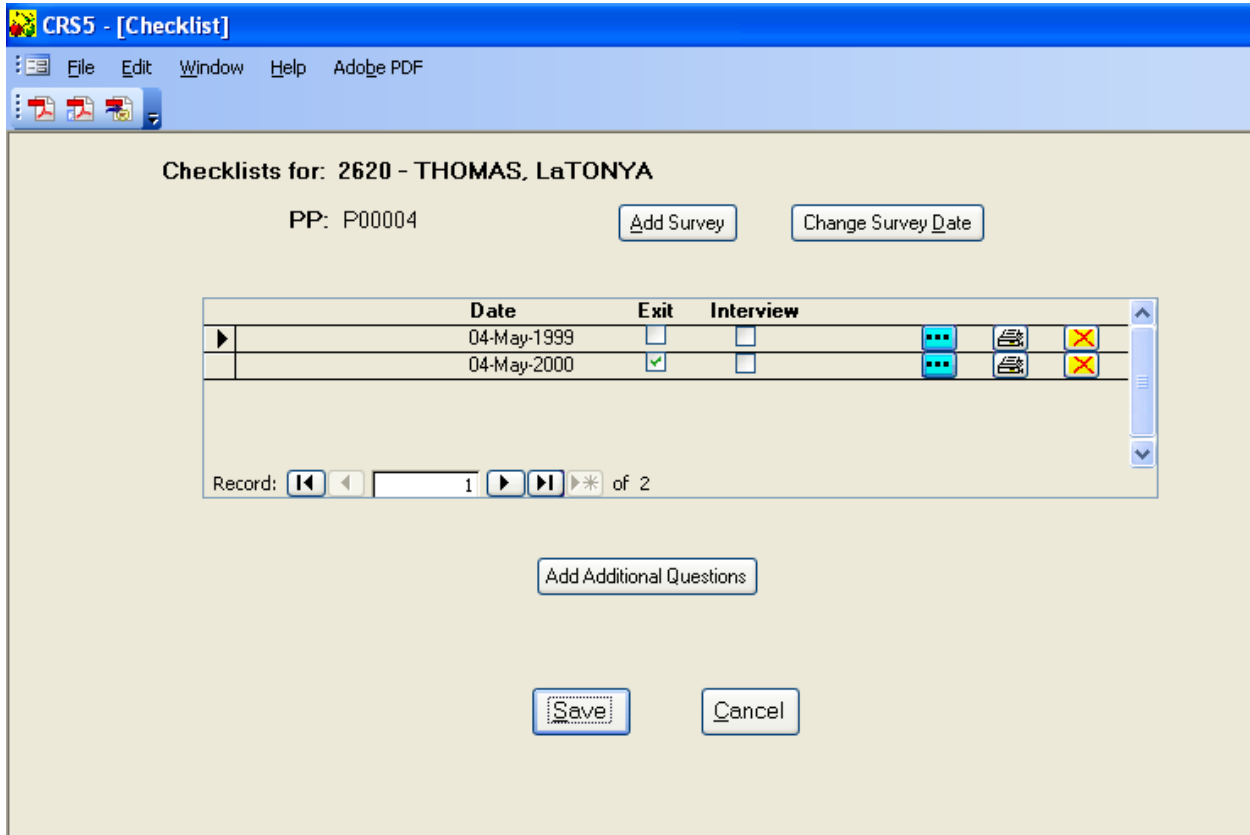


Backdoor  out to the Main Switchboard.

10.2.2. Utilizing Checklist Question Sets

In order to utilize this imported Question Set you must go into an individual record and enable this feature. Use the following directions as a guide to insure that you have imported the questions sets you wish to use.


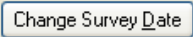
- From the Main Switchboard click 
- Then click 
- Click on the **BLUE Explode** button to open an individual's Checklist.
- Click on 














CRS5 - [Checklist]

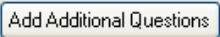
File Edit Window Help Adobe PDF



Checklists for: 2620 - THOMAS, LaTONYA

PP: P00004  

	Date	Exit	Interview			
▶	04-May-1999	<input type="checkbox"/>	<input type="checkbox"/>			
	04-May-2000	<input checked="" type="checkbox"/>	<input type="checkbox"/>			

Record:   1    of 2



- Highlight the Question Set that you previously imported and click

Save

CRS5 - [Add Question Set]

File Edit Window Help Adobe PDF

Optional Question Set for: 3718 - REKITA, SANDER

Click the set to be used for this participant. Then click SAVE.
Click CANCEL to not use optional questions at this time.

Question Sets

001	Test Question Set

Set to be added: 001

Save Cancel

You are now back at the individual screen. Notice that the button now says “Remove Additional Questions”

Click on the **BLUE Explode** button

CRS5 - [Checklist]

File Edit Window Help Adobe PDF

Checklists for: 2620 - THOMAS, LaTONYA

PP: P00004

Date	Exit	Interview			
04-May-1999	<input type="checkbox"/>	<input type="checkbox"/>
04-May-2000	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Record: 2 of 2

Set ID of additional questions: 001

This screen reflects the 10 base checklist questions. Notice the tab that says Additional Questions.

CRS5 - [Edit Checklist]

File Edit Window Help Adobe PDF

Participant: 2620 - THOMAS, LaTONYA PP: P00004 - MITCHELL, DORIA 5/21/1999

Survey Date: 04-May-1999 Exit Survey: ☐ Interview: ☐ Set ID: 001

Base Questions **Additional Questions**

Question	N/A	Response					
		0	1	2	3	4	5
1. Plan meals ahead	2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Compare prices before buying food	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Run out of food before the end of the month	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Shop with a grocery list	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Let foods sit out for more than two hours	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Thaw frozen foods at room temperature	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Think about healthy food choices	2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Prepare foods without adding salt	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Use "Nutrition Facts" on the food label to make food choices	2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Children eat within 2 hours of waking up	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Click on the Additional Questions Tab and you should see the question set that you previously imported.

CRS5 - [Edit Checklist]

File Edit Window Help Adobe PDF

Participant: 2620 - THOMAS, LaTONYA PP: P00004 - MITCHELL, DORIA 5/21/1999 8:

Survey Date: 04-May-1999 Exit Survey: ☐ Interview: ☐ Set ID: 001


Base Questions Additional Questions

Question		N/A	Yes	No	Response				
		0	1	2	3	4	5		
1. Read labels for salt/sodium content	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2. Read food labels for fat content	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3. Cut size of children's meals	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
4. Family's food and nutrition needs being met	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
5. Do you serve more than one kind of fruit	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
6. Check grocery stores sales ads	?	Times (? = N/A)							

Save Cancel

Now you can enter the appropriate responses to the questions.

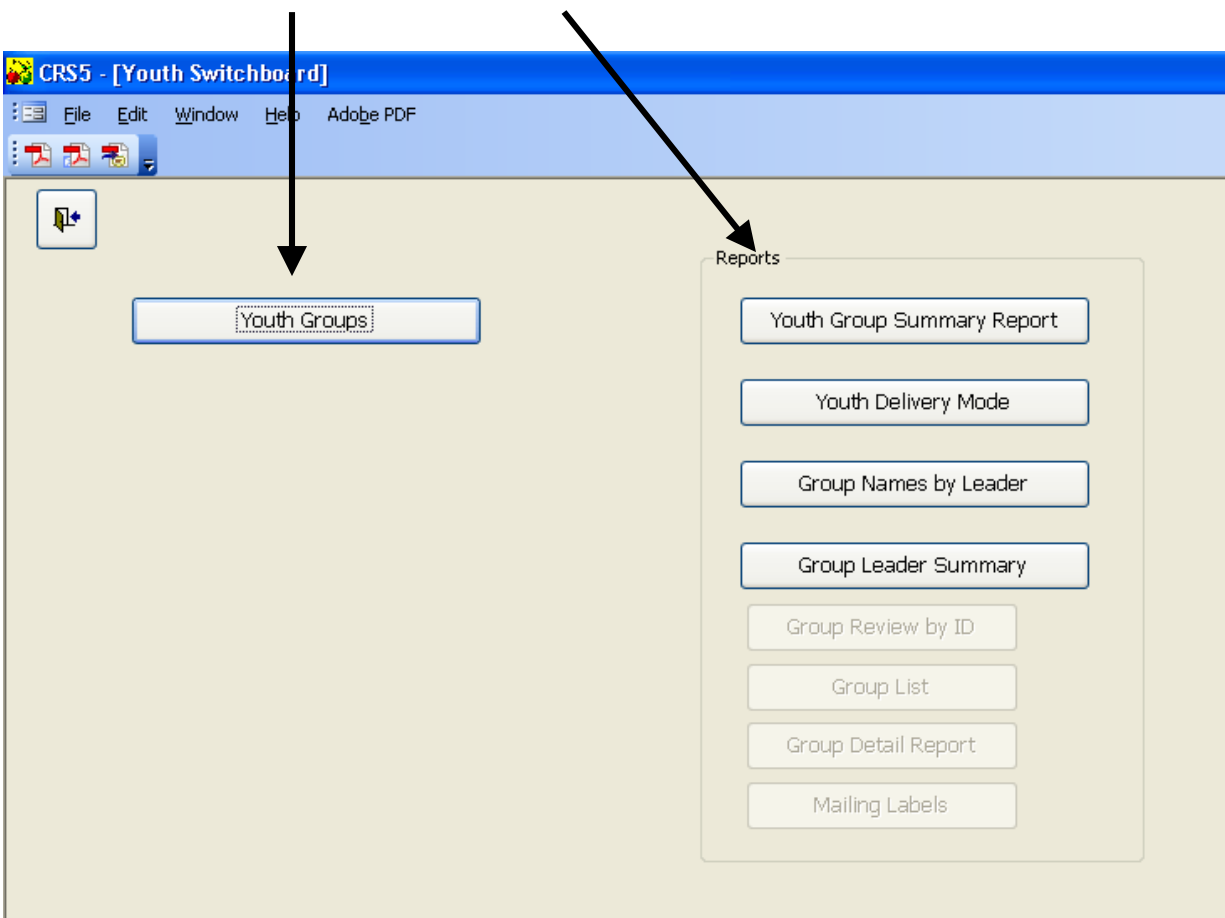
Click 

Backdoor  out twice to the Main Switchboard.

11. The Youth Switchboard

Most of the information used for Youth Groups in CRS5 is the same as in ERS4; however there have been a few format changes. These changes will be identified throughout the instructions. A major change which is still in the developmental stages for NEERS5 is Youth Evaluation. The Youth Impact Indicators which were used in ERS4 will continue to be used in NEERS5 at least until the Youth Question Database (YQD) and accompanying instructions for use have been thoroughly field tested. Instructions for using the Practice Sets are included at the end of this section. Additional information on the YQD will be provided throughout the year.

Adding youth by groups is a good management concept. It allows collecting data for youth in a time efficient manner. On the Youth Switchboard there are two main options: Adding Youth Groups and Reports.



Each option will be discussed separately starting with **Adding Youth Groups**.

11.2. Adding Youth Groups

- From the Main Switchboard click on the **YOUTH** button
- Click **YOUTH GROUPS**
- If previous Youth Groups have been added or converted from ERS4 they will appear.

This screen has several new features. You can sort the columns by column heading. Also, program type and delivery method are given on this screen. The leader is referred to by name instead of by number and the number of youth in each group is listed on this screen.

CRS5 - [Youth Groups by ID]

File Edit Window Help Adobe PDF

Locate ID: Add Youth Group

ID	Enroll Type	Program	Delivery	Leader	Group Name	# Youth		
219	Group	A	L	MITCHELL, DORIA	EARLY ADVENTURES CENTER	26	...	✖
220	Group	A	E	MITCHELL, DORIA	DEEP CREEK MORNING DOVE 4-H CLUB	9	...	✖
221	Group	A	F	MITCHELL, DORIA	CAMELOT AFTERSCHOOL PROGRAM	54	...	✖
222	Group	A	J	MITCHELL, DORIA	SOUTHWESTERN ELEMENTARY SCHOOL	20	...	✖
223	Group	A	F	JONES, WILHELMENI	MacDONALD MANOR HEADSTART	10	...	✖
224	Group	A	F	JONES, WILHELMENI	B M WILLIAMS PRIMARY SCHOOL - DAVENPOT	79	...	✖
225	Group	A	F	JONES, WILHELMENI	ETHEL JONES HEADSTART	18	...	✖
226	Group	A	J	JONES, WILHELMENI	CARVER HEADSTART	54	...	✖
227	Group	A	F	JONES, WILHELMENI	CRESTWOOD INTERMEDIATE AFTERSCHOOL	38	...	✖
228	Group	A	J	JONES, WILHELMENI	TRUITT INTERMEDIATE SCHOOL	56	...	✖
229	Group	A	L	MITCHELL, DORIA	CAVALIER MANOR HEAD START	36	...	✖
230	Group	A	F	MITCHELL, DORIA	SOUTHWESTERN USDA PROGRAM	46	...	✖
231	Group	A	F	MITCHELL, DORIA	CAMELOT TEEN PROGRAM	12	...	✖
232	Group	A	F	MITCHELL, DORIA	CAMELOT SUMMER USDA	68	...	✖
233	Group	A	F	MITCHELL, DORIA	DEEP CREEK COMMUNITY CENTER	100	...	✖
234	Group	A	F	JONES, WILHELMENI	CALVARY EVANGELICAL BAPTIST CHURCH	36	...	✖
235	Group	A	F	JONES, WILHELMENI	CHESAPEAKE REDEVELOPMENT PROJECT	✖

- To add a new group click

Add Youth Group

Add Youth Group

Then enter the ID of new Youth Group and click the Enrollment Type.
Click Close when through adding.

ID of new youth group

Individual Enrollment

Group Enrollment

Close

- A default ID number will appear. This can be changed if desired.
- Click Group Enrollment

CRS5 - [New Youth Group]

File Edit Window Help Adobe PDF

Group Enrollment 20-Jun-2006

Group ID: 246 Group Name: New

Program: A EFNEP

Delivery: A

Name: New

Address: Address not verified.

City-State-ZIP: Athens VA

County: FIPS Code:

Cong. District: MSA: Lat-Long:

Phone: Ext:

Start: 01-Oct-2005 End: 29-Sep-2006

Number of Meetings: 0 Contact Hours: 0

Verify Address

Leaders: Each group must have at least one leader.

Remarks:

Impact Indicators

Indicator	Applies	Percent
Eat Variety:	<input type="checkbox"/>	0.0 %
Knowledge:	<input type="checkbox"/>	0.0 %
Select Food:	<input type="checkbox"/>	0.0 %
Practices:	<input type="checkbox"/>	0.0 %

Question Sets (Not yet implemented, use for practice only)

Set Name

Save Cancel Save and Print Group Record

NEW - Click to verify address if required information has been entered

YOUTH BY GENDER

Females:	0
Males:	0
Total Youth:	0

Number of Youth in Other 4H: 0

YOUTH BY RESIDENCE

Farm:	0
< 10,000 & Rural:	0
10,000 - 50,000:	0
Suburbs > 50,000:	0
Cities > 50,000:	0

YOUTH BY ETHNICITY

Hispanic or Latino:	0
Not Hispanic/Latino:	0
Not Given:	0

YOUTH BY RACE

AI or AN:	0
Asian:	0
Black:	0
NH or OPI:	0
White:	0
Mixed Race:	0
Not Given:	0

Race/Ethnic Subcategory

No Race/Ethnic Subcategories.

YOUTH BY GRADE

P-2Yr:	0
P-3Yr:	0
P-4Yr:	0
K:	0
Gr 1:	0
Gr 2:	0
Gr 3:	0
Gr 4:	0
Gr 5:	0
Gr 6:	0
Gr 7:	0
Gr 8:	0
Gr 9:	0
Gr 10:	0
Gr 11:	0
Gr 12:	0
Special:	0

- Complete the following: Group name, program type, delivery mode, name and address of the youth site with zip-codes.
 - The city, state, and zip code are required fields.
 - “**Verify Address**” enables you to determine Congressional district, county name and Latitude/Longitude information.
 - The computer with the CRS5 software must have **INTERNET ACCESS** for the **VERIFY ADDRESS** option to work.
 - **If you choose not to verify the address you will still be allowed to save your data and move forward.**

Listing at least one Youth Leader is required in CRS5.

- To add leaders click on the **BLUE explode** button above the Blue leader box.
- The “Youth Group Leaders” box appears.
- Click **ADD LEADER** to choose a leader from the staff database.

Rank	Leader	Change Rank
1	P00004 MITCHELL, DORIA	[Up] [Down] [X]
2	V00717 STRICKLAND, KATHERINE	[Up] [Down] [X]
3	V00719 BURROUGH, PAMELA	[Up] [Down] [X]
4	V00720 RAZOR, MARTHA	[Up] [Down] [X]

CHANGE RANK - You can click these arrows to change the rank or order of the leaders for this group.

- The “Add Group Leader” dialogue box appears which consists of a list of staff and volunteers

Select	ID	Name	City	PP ID
<input type="checkbox"/>	A00001	Professional, Test	VA	
<input type="checkbox"/>	P00001	BUFKA, IRIS	CHESAPEAKE VA	
<input type="checkbox"/>	P00004	MITCHELL, DORIA	PORTSMOUTH VA	
<input type="checkbox"/>	P00005	JONES, WILHELMENI	NORFOLK VA	
<input type="checkbox"/>	V00014	AMES, GLENDA	CHESAPEAKE VA	P00005
<input type="checkbox"/>	V00086	McDERMOTTE, SUSAN	CHESAPEAKE VA	P00005
<input type="checkbox"/>	V00177	JONES, DEE	CHESAPEAKE VA	P00001
<input type="checkbox"/>	V00357	BLAKE, CONNIE	CHESAPEAKE VA	P00004
<input type="checkbox"/>	V00379	SWAIN, VALARIE	CHESAPEAKE VA	P00005
<input type="checkbox"/>	V00457	BERRY, CAROLYN	CHESAPEAKE VA	P00005
<input type="checkbox"/>	V00467	LAMB, MONICA	CHESAPEAKE VA	P00004
<input type="checkbox"/>	V00474	ADAMS, JENNIVER	CHESAPEAKE VA	P00005
<input type="checkbox"/>	V00512	BURKHALTER, KAREN	CHESAPEAKE VA	P00004
<input type="checkbox"/>	V00533	WILLIAMS, SABRINA	CHESAPEAKE VA	P00005
<input type="checkbox"/>	V00564	BROWN, JANET	CHESAPEAKE VA	P00005

- Click the hand icon to add this leader to the youth group. You can only choose one leader at a time. If you have to choose multiple leaders you will need to repeat the above steps starting at the Youth Group Leaders Screen.

- Demographic information concerning Gender, Youth in Other 4-H, Residence, Ethnicity, Race, and Grade:
 - Start by clicking inside the box next to Females. If you start here you can tab through all of the information in order.

CRS5 - [Edit Youth Group] 11-Jul-2003

Group ID: 223 Group Name: MacDONALD MANOR HEADSTART

Program: A EFNEP

Delivery: F 4-H Special Interest / Short-Term Programs

Name: MacDONALD MANOR HEADSTART

Address: 1331 MACDONALD ROAD Address not verified.

City-State-ZIP: CHESAPEAKE VA 23325 Verify Address

County: FIPS Code:

Cong. District: MSA: Lat-Long:

Phone: (757) 233-6724 Ext:

Start: 06-Oct-2002 Early Date

End: 30-May-2003

Number of Meetings: 6

Contact Hours: 6

Leaders: P00005 - JONES, WILHELMENI
V00729 - HOOKS, GLADYS
V00728 - OVERTON, BETTY

Impact Indicators

Indicator	Applies	Percent
Eat Variety:	<input checked="" type="checkbox"/>	55.0 %
Knowledge:	<input checked="" type="checkbox"/>	98.0 %
Select Food:	<input checked="" type="checkbox"/>	48.0 %
Practices:	<input checked="" type="checkbox"/>	73.7 %

Question Sets (Not yet implemented, use for practice only)

Set Name

Remarks: ERS4 Initiative=A
ERS4 DeliveryMode=B

YOUTH BY GENDER

Gender	Count
Females:	5
Males:	5
Total Youth:	10

Number of Youth in Other 4H: 0

YOUTH BY RESIDENCE

Residence	Count
Farm:	0
< 10,000 & Rural:	0
10,000 - 50,000:	0
Suburbs > 50,000:	10
Cities > 50,000:	0

YOUTH BY GRADE

Grade	Count
P-2Yr:	0
P-3Yr:	0
P-4Yr:	3
K:	7
Gr 1:	0
Gr 2:	0
Gr 3:	0
Gr 4:	0
Gr 5:	0
Gr 6:	0
Gr 7:	0
Gr 8:	0
Gr 9:	0
Gr 10:	0
Gr 11:	0
Gr 12:	0
Special:	0

YOUTH BY ETHNICITY

Ethnicity	Count
Hispanic or Latino:	0
Not Hispanic/Latino:	10
Not Given:	0

YOUTH BY RACE

Race	Count
AI or AN:	0
Asian:	0
Black:	10
NH or OPI:	0
White:	0
Mixed Race:	0
Not Given:	0

Race/Ethnic Subcategory

No Race/Ethnic Subcategories.

Save Cancel Save and Print Group Record

- If your state utilizes Race/Ethnic Subcategories click on the **BLUE explode** button to enter the additional race information concerning Subcategories. This information is in addition to what you have already reported in the boxes above this section.

Race/Ethnic Subcategory

Use of Race/Ethnic Subcategories must be in compliance with your state regulations and requirements.

Enter the number of youth for each Race/Ethnic Subcategory

Subcategory	Number of Youth
African American	0

Click a Subcategory from the list on the left to add it to the list on the right.

African American
Alaskan
Aleut
American Indian
Caldean
Cambodian
Caribbean
Central American
Chinese
Creole
Cuban
Dominican
El Salvadorian
Ethiopian
European

- If you enter numbers that do not add up equally across all categories you will get a message that looks like this:

10-Jun-2003

Totals by Gender, Residence, Ethnicity, Race, and Grade do not match. Also, check Other 4H and Race/Ethnic Subcategory.

NEW – CRS5 helps our math by double checking the totals across all fields. You will not be able to save a group record unless all the totals are EQUAL.

Youth by Gender		Number of Youth in Other 4H	
Females:	12		0
Males:	14		
Total Youth:	26		

Youth by Residence		Youth by Grade	
Farm:	0	P-2Yr:	0
< 10,000 & Rural:	1	P-3Yr:	0
10,000 - 50,000:	0	P-4Yr:	9
Suburbs > 50,000:	26	K:	17
Cities > 50,000:	0	Gr 1:	0
	27	Gr 2:	0
		Gr 3:	0
		Gr 4:	0
		Gr 5:	0
		Gr 6:	0
		Gr 7:	0
		Gr 8:	0
		Gr 9:	0
		Gr 10:	0
		Gr 11:	0
		Gr 12:	0
		Special:	0
			26

Youth by Ethnicity	
Hispanic or Latino:	0
Not Hispanic/Latino:	26
Not Given:	0
	26

Youth by Race	
AI or AN:	0
Asian:	0
Black:	19
NH or OPI:	0
White:	7
Mixed Race:	0
Not Given:	0
	26

Race/Ethnic Subcategory
 No Race/Ethnic Subcategories.

Save Cancel Save and Print Group Record

11.3 Youth Question Database Practice Question Sets

The Youth Question Database (YQD) is a new evaluation component which will be added to NEERS5/CRS5 in the near future. It is in the development/testing stage and more information will be forthcoming. A demonstration/practice section is included in this release of NEERS5 as a preview.

PLEASE NOTE THAT ANY INFORMATION ENTERED IN THE YQD DEMONSTRATION/PRACTICE SECTION OF THIS RELEASE OF CRS5 WILL NOT BE USED FOR EVALUATION AND REPORTING PURPOSES.
This section is for your information only.

Demonstration Instructions with Fictitious Data for Practice:

From a Youth Group screen, click on the ARROW button next to the column, "Set Name."

CRS5 - [Edit Youth Group]

File Edit Window Help Adobe PDF

Group Enrollment 11-Jul-2003

Group ID: 223 Group Name: MacDONALD MANOR HEADSTART

Program: A EFNEP

Delivery: F 4-H Special Interest / Short-Term Programs

Name: MacDONALD MANOR HEADSTART

Address: 1331 MACDONALD ROAD Address not verified.

City-State-ZIP: CHESAPEAKE VA 23325 Verify Address

County: FIPS Code:

Cong.District: MSA: Lat-Long:

Phone: (757) 233-6724 Ext:

Start: 06-Oct-2002 Early Date

End: 30-May-2003

Number of Meetings: 6

Contact Hours: 6

Leaders: P00005 - JONES, WILHELMENI
V00729 - HOOKS, GLADYS
V00728 - OVERTON, BETTY

Impact Indicators

Indicator	Applies	Percent
Eat Variety:	<input checked="" type="checkbox"/>	55.0 %
Knowledge:	<input checked="" type="checkbox"/>	98.0 %
Select Food:	<input checked="" type="checkbox"/>	48.0 %
Practices:	<input checked="" type="checkbox"/>	73.7 %

Question Sets (Not yet implemented, use for practice only)

Set Name

Remarks: ERS4 Initiative=A
ERS4 DeliveryMode=B

Save Cancel Save and Print Group Record

Youth by Gender

Females:	5
Males:	5
Total Youth:	10

Number of Youth in Other 4H

	0
--	---

Youth by Residence

Farm:	0
< 10,000 & Rural:	0
10,000 - 50,000:	0
Suburbs > 50,000:	10
Cities > 50,000:	0

Youth by Ethnicity

Hispanic or Latino:	0
Not Hispanic/Latino:	10
Not Given:	0

Youth by Race

AI or AN:	0
Asian:	0
Black:	10
NH or OPI:	0
White:	0
Mixed Race:	0
Not Given:	0

Race/Ethnic Subcategory

No Race/Ethnic Subcategories.

Youth by Grade

P-2Yr:	0
P-3Yr:	0
P-4Yr:	3
K:	7
Gr 1:	0
Gr 2:	0
Gr 3:	0
Gr 4:	0
Gr 5:	0
Gr 6:	0
Gr 7:	0
Gr 8:	0
Gr 9:	0
Gr 10:	0
Gr 11:	0
Gr 12:	0
Special:	0

Question Sets are listed for the purpose of practicing with fictitious data.

In the complete YQD when it is released, states may, at their discretion, choose to develop their own Question Sets (for use in their counties) of evaluation questions selected from the entire collection of evaluation tools that will be in the YQD.

- For this practice, click on the set of practice questions entitled, Professor Popcorn.

- Give the set a name that fits your needs. In this example, this Question Set will be part of the evaluation for our nutrition education program called Better Health. We will type in “BetterHealth” as the name for this Question Set (12 characters max).
- Click Save

Notice that the set name, “BetterHealth” now appears in the Question Sets box. From this point, you can add evaluation data by clicking on the **BLUE explode** button beside the BetterHealth Question Set and then beside each question used in the evaluation.

Click on the **BLUE explode** button for Question 1, “When do I wash my hands? “

Seq	Question ID	Series	Grade	Lesson/Question	Before	After
1	IN.0001	Professor Popcorn	P-4Yr Gr 2	Lesson One - Exploring the Food Pyramid with Professor Popcorn When do I wash my hands?	TBD	...
2	IN.0002	Professor Popcorn	P-2Yr Gr 6	Lesson One - Exploring the Food Pyramid with Professor Popcorn I wash my hands...	TBD	...
3	IN.0003	Professor Popcorn	P-4Yr Gr 2	Lesson 2 - Exploring the Food Pyramid with Professor Popcorn Circle foods from the grain group	TBD	...
4	IN.0004	Professor Popcorn	Gr 3 Gr 6	Lesson Five - Exploring the Food Pyramid with Professor Popcorn How I handle spoiled food	TBD	...
5	IN.0005	Professor Popcorn	P-4Yr Gr 2	Lesson 3 - Exploring the Food Pyramid with Professor Popcorn Circle foods from the Vegetable Group	TBD	...
6	IN.0006	Professor Popcorn	Gr 3 Gr 6	Lesson 3 - Exploring the Food Pyramid with Professor Popcorn Variety of fruit daily	TBD	...

Enter date of Pretest and response information for this question on the Pretest. Note that you will be entering summary data from a group of youth who answered this question—in other words, enter the total number of responses for each possible answer category. Percentages are not used.

Enter date of Pretest and response information for this question on the Pretest. Note that this is the total number of responses for each category. Percentages are not used.

Out of the number of youth who were asked the question, complete the information in the appropriate columns. The column heads will vary depending upon the response choices for each question. The number of non-responses will be calculated based on the total number of youth who were asked the question minus the responses in the preceding columns.

Example:

Responses to Question

For each column, enter the number of youth who responded with that answer.

Question ID: IN.0001
Series: Professor Popcorn
Lesson: Lesson One - Exploring the Food Pyramid with Professor Popcorn
Question: When do I wash my hands?

	Number of youth who answered all 3 correct	Number of youth who answered 2 of 3 correct	Number of youth who answered 1 of 3 correct	Number of youth with no correct answers	Number of non-responses	Total number of participants asked the question	
Date of Responses							
Before:	06/16/06	0	10	15	2	3	30
After:		0	0	0	0	0	0

Save **Cancel**

Date of Responses Before: 6/16/06.

Number of youth who answered all 3 correct: 0

Number of youth who answered 2 of 3 correct: 10

Number of youth who answered 1 of 3 correct: 15

Number of youth with no correct answers: 3

Number of non-responses: This will be calculated for you after you enter total number of participants asked the question.

Total number of participants asked the question: 30*

*Note that this may not be the total number of youth in the group.

Notice that the number of non-responses is now filled in, n=3

For this example enter post test information as follows:

Responses to Question

For each column, enter the number of youth who responded with that answer.

Question ID: IN.0001
 Series: Professor Popcorn
 Lesson: Lesson One - Exploring the Food Pyramid with Professor Popcorn
 Question: When do I wash my hands?

Date of Responses	Number of youth who answered all 3 correct	Number of youth who answered 2 of 3 correct	Number of youth who answered 1 of 3 correct	Number of youth with no correct answers	Number of non-responses	Total number of participants asked the question
Before: 06/16/06	0	10	15	2	3	30
After: 07/06/06	8	11	7	1	1	28

Save Cancel

Date of post-test (after): July 6, 2006

Number of youth who answered all 3 correct: 8

Number of youth who answered 2 of 3 correct: 11

Number of youth who answered 1 of 3 correct: 7

Number of youth with no correct answers: 1

Number of non-responses: This will be calculated for you after you enter total number of participants asked the question.

Total number of participants asked the question: 28*

*Note that this may not be the total number of youth in the group nor will it necessarily be the same as the number who took the pre-test.

Notice that the number of non-responses is now filled in, n-1.

Click Save to return to the Test Questions screen to enter data for additional questions.

If you are finished entering question data click the Backdoor to go out to the Edit Youth Group screen.

In this practice example, we will be using a question from the Food Safety data set in addition to Professor Popcorn.

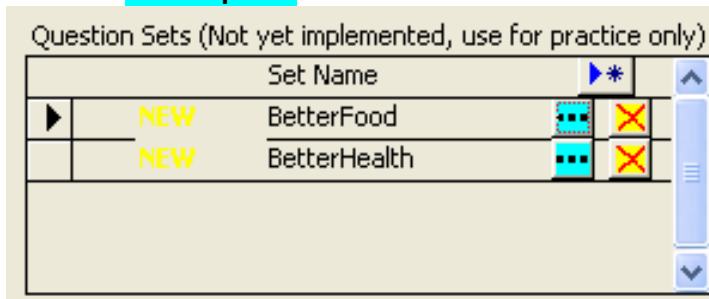
Click on the arrow under “Question Sets.”

Highlight Food Safety.

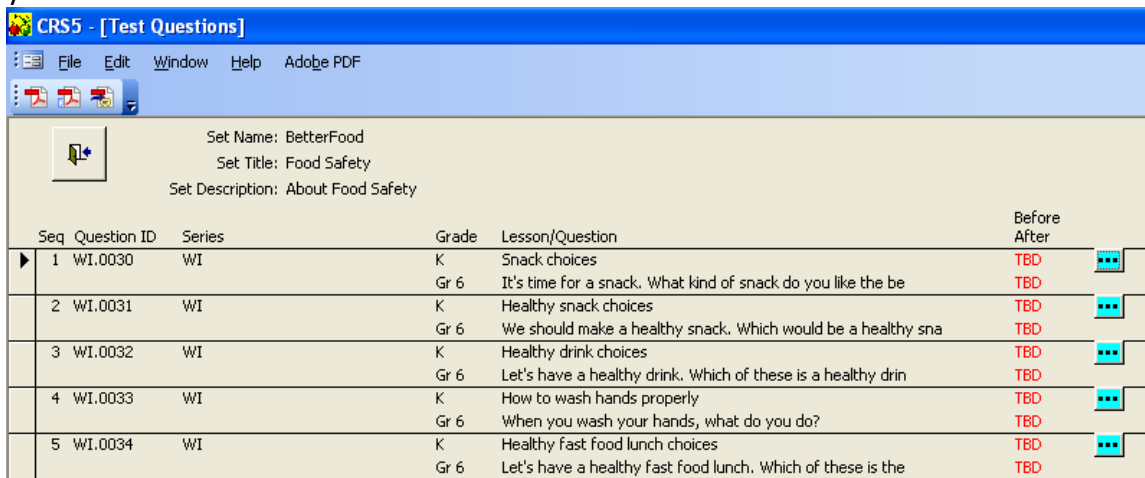
Name this question set “BetterFood.”

Click Save

Click the **Blue Explode** button beside Better Food.



Click the **Blue explode** button beside Question 1, “It’s time for a snack. What kind of snack do you like the best?”



Complete the date of the pre-test (before) – June 16, 2006.

Notice that these response choices are set up differently from the Professor Popcorn set. The number of responses to Choice A was 3, B = 2, C = 11 and the total number of youth who were asked the question was 28. Notice that “12” is filled in under number who didn’t respond.

Responses to Question

For each column, enter the number of youth who responded with that answer.

Question ID: WI.0030
Series: WI
Lesson: Snack choices
Question: It's time for a snack. What kind of snack do you like the be

	Number of Participants Answering 'A'	Number of Participants Answering 'B'	Number of Participants Answering 'C'	Number of non-responses	Total number of participants asked the question
Before:	3	2	11	12	28
After:	0	0	0	0	0

Save Cancel

Click Save and complete responses to additional questions for practice if desired.

When you are finished entering test data:

Click Save

Backdoor out to the Edit Youth Group screen

Click Save and return to the Youth switchboard.

Information on how to submit your evaluation tools for review is available on the NEERS5 website - www.csrees.usda.gov/NEERS5. States are encouraged to submit tools as soon as possible.